

# Chancery SMS®

Version 6.6 or higher

## Program Management Guide

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# ABOUT CHANCERY SMS

Welcome to Chancery SMS<sup>®</sup>, a software tool for managing student and family information in your school district.

## Support Services Available

A full suite of documentation, online Help, and technical support is available to help you with your day-to-day tasks.

### Documentation Included

The following documentation is included with Chancery SMS:

See	For
Chancery SMS Guides	<p>The following guides are available in PDF format on the Installation CD and at our Support web site:</p> <ul style="list-style-type: none"> <li>• <b>District Administration Guide:</b> For district administrators, the District Administration Guide provides instructions on maintaining the centralized Chancery SMS solution, including setting up your district, adding schools to the district, and standardizing data across the district using setup lists.</li> <li>• <b>District User Guide:</b> For district office staff, the District User Guide provides instructions on using Chancery SMS at a district level, including registering and enrolling students and working with student data.</li> <li>• <b>School Administration Guide:</b> For school administrators, the School Administration Guide provides instructions on maintaining a school and performing administrative tasks.</li> <li>• <b>School Setup Guide:</b> The School Setup Guide provides instructions for setting up schools in the district, including the steps to be performed as a district administrator and as a school administrator.</li> <li>• <b>School User Guide:</b> For school office staff, the School User Guide provides instructions on using Chancery SMS at the school level, including how to take attendance, enter grades, and work with student data in the office.</li> <li>• <b>Chancery SMS in the Classroom:</b> This guide covers the basics of using Chancery SMS at the homeroom and class level, including how to take attendance, enter grades, and work with student data in the classroom.</li> </ul>

<b>See</b>	<b>For</b>
Chancery SMS Speciality Guides	<p>Additional feature-specific guides are available in PDF format on the Installation CD and at our Support web site to supplement the standard guides:</p> <ul style="list-style-type: none"> <li>• <b>Address Validation Guide:</b> For school and district administrators, the Address Validation Guide provides instructions on setting up address validation at the district and performing address validation tasks at the district and at schools.</li> <li>• <b>cTools Guide:</b> This guide provides information about customizing Chancery SMS, along with instructions for using the customization features.</li> <li>• <b>Grading Setup Guide:</b> For school administrators, the Grading Setup Guide provides instructions on setting up grading properties and performing grading-related tasks.</li> <li>• <b>Permissions Guide:</b> For district administrators, this guide provides information about setting up permissions in Chancery SMS. The Permissions Guide explains the permission structure and provides information about each permissions dependencies, effect on the system, options, and defaults.</li> <li>• <b>Program Management Guide:</b> For district and school administrators and district and school staff who enroll students and process applications, the Program Management Guide is a feature-specific guide that describes the process of setting up programs at the district and at schools and performing program-related tasks.</li> <li>• <b>Registration and Enrollment Quick Guide:</b> For school and district staff, the Registration and Enrollment Quick Guide provides procedures for registering students in the district and enrolling students in schools.</li> <li>• <b>Scheduling Guide:</b> For school administrators, the Scheduling Guide covers the process of setting up a school scheduling structure, as well as scheduling in elementary and secondary schools.</li> <li>• <b>Next-Year Preparation and Year-End Processing Guide:</b> For district and school administrators, this guide covers all the steps required to close off the current school year and prepare for the next.</li> </ul>

See	For
Chancery SMS Technical Guides	<p>Technical guides are available in PDF format on the Installation CD and at our Support web site:</p> <ul style="list-style-type: none"> <li>• <b>cTools Guide (Customization Guide):</b> For district administrators, this guide covers how to create custom student pages, custom panels for existing pages, customization packages, custom reports, and custom setup lists in Chancery SMS.</li> <li>• <b>Import/Export Guide:</b> For district administrators, the Import/Export Guide describes the process for importing and exporting data into and out of Chancery SMS.</li> <li>• <b>Interoperability Guide:</b> For district administrators, the Interoperability Guide covers how to integrate third-party applications with Chancery SMS using SIF and Import/Export functionality.</li> <li>• <b>Report Writer Guide:</b> For district and school administrators and third-party report writers, the Report Writer Guide covers how to plan, build, and upload reports using the new reporting framework. The guide also includes an in-depth examination of this framework, extensive information about how to use Crystal Reports functionality, and reference material on using previous reporting methods.</li> </ul>
Chancery SMS Online Help	Help is always available by accessing the Help menu from the task bar.
Chancery SMS Data Dictionary	The data dictionary contains lists of tables and fields in the district database. It is recommended for the report developer who uses a reporting tool such as Crystal Reports® to retrieve additional information from the district database.
Release Notes	Release Notes are summaries of the new features and changes in the current release.
Installation Documentation	<p>The Installation Guide provides technical details of installing the entire Chancery SMS system for district administrators.</p> <p>Installment Notes are detailed instructions for upgrading from a prior version.</p>

## Getting Training

Training courses are available to help ensure you get every advantage from your student information system. We are committed to helping you put our solutions to work. Our broad training offerings are designed with you in mind so that you'll receive the most suitable and effective training for your needs.

Choose from on site training or live online training. We can also create a customized training program to meet your district's needs.

Phone us toll free at 1-800-999-9931 or see the Training area of our Support web site at <http://support.chancery.com> for an up-to-date list of scheduled courses.

## Getting Support

The following support programs are available by subscription only:

<p>One-on-one Technical Support</p>	<p>Talk to a technical support analyst to help solve problems and answer questions when software doesn't produce the expected results. Analysts can use the telephone or Internet access to troubleshoot your issues.</p> <p>Monday to Friday, 5 am to 5 pm Pacific Time                  Phone: 1-800-688-9939                  Fax: 1-800-446-5650                  Email: <a href="mailto:psstechsupp@pearson.com">psstechsupp@pearson.com</a></p>
<p>Access to our web site</p>	<p><a href="http://support.chancery.com">http://support.chancery.com</a>                  In Chancery SMS, from the Help menu, click Support Website.</p> <p>Our web site includes a searchable KnowledgeBase with frequently asked questions, tips, and troubleshooting instructions, as well as support forums for users to share experience and knowledge.</p>
<p>Software updates</p>	<p>Releases of new versions with improved functions and software updates. Updates are provided free of charge for three months from your date of purchase and are included in the subscription to Support Programs.</p>

For more information about Technical Support Programs, phone Customer Service at 1-800-999-9931.

# OVERVIEW OF PROGRAM MANAGEMENT

Program Management enables you to create and manage specialized activities or courses of study that are enhancements to or replacements for regular academic programs. Your district may offer programs in several different categories, such as after-school athletics, free and reduced-priced meals, support for homeless students, and so on.

The district defines the programs that are available in the district and assigns them to the schools where they are offered. Schools then further set up the programs assigned to their school and schedule program classes.

Once programs are set up in the district and at schools, students can apply to program sessions offered at schools in the district. If eligibility rules are defined, they determine whether students can be assigned to the program.

Eligibility rules may be defined for queues and for programs and, if defined, students must meet the criteria for both the queue and the program before they can be assigned to the program. In addition, queues can be set up to limit the capacity of the program and students can be ranked within the queue. Ranks can be assigned sequentially according to the order student applications are entered or randomly to create a lottery enrollment. If ranks are used, students cannot be assigned to the program if another student in the queue has a higher rank. For more information about eligibility, see “Calculating Student Eligibility” on page 151.

Programs can also be used to control enrollment in schools. If the school controls enrollment, you cannot enroll students in the school unless they are offered a position in and are eligible for a controlled enrollment program at that school. Students cannot be assigned to a program until they are enrolled in the school. For more information about controlling enrollment, see “Controlling Enrollment in Schools” on page 56.

## Program Management Process

The following steps describe the overall procedure required to set up and manage programs:

**Step 1:** The district sets preferences that define how Program Management works in the district. For more information, see “Setting Program Management District Preferences” on page 22.

**Step 2:** The district populates Program Management setup lists. Program Management includes many pre-populated setup lists; however, to address your districts needs, you may need to modify the existing setup lists. For more information about working with Program Management setup lists, see “Working with Program Management Setup Lists” on page 24.

**Step 3:** The district creates programs and assigns them to schools. When the district creates programs, they add contacts and funding information, specify qualified staff, and create rules that determine which students are eligible to participate in the program. For more information, see “Creating Programs” on page 32.

**Step 4:** A district or school administrator sets up programs at specific schools. Schools can only offer programs that are assigned to them by the district. At the school, you add school contacts, assign specific staff to the program, create queues of applicants for the program and define constraints for program classes. For more information, see “Setting Up School Programs” on page 85.

**Step 5:** A school administrator creates student applications to programs, calculates eligibility, and enrolls students in the schools that offer programs, as required. For more information, see “Applying to Programs and Enrolling in Schools” on page 113.

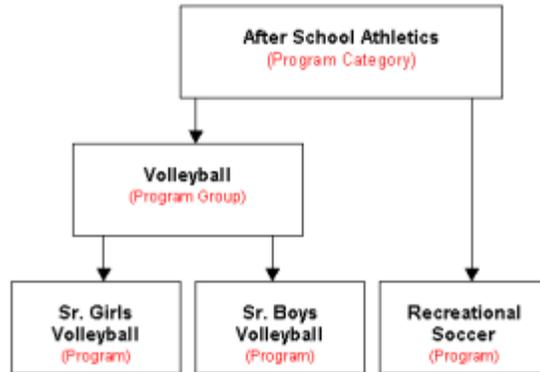
**Step 6:** A district or school administrator manages student applications and participation in programs. For more information, see “Managing Participants” on page 165.

## Understanding Program Organization

To provide flexibility in how districts organize and manage programs, programs have three levels of organization:

Organizational Level	Description
Program Category	<p>Program categories are the first level of organization. All program groups and programs are contained within a program category. For example, After School Athletics.</p> <p>Students are not enrolled directly in program categories; rather, they are enrolled in programs contained within program categories.</p>
Program Group	<p>Program groups contain similar programs within a program category. For example, Volleyball. Students are not enrolled directly in program groups; rather, they are enrolled in programs contained within program groups.</p> <p><b>Note</b> Program groups are not required.</p>
Program	<p>Programs are the individual programs in which students are enrolled. For example, Sr. Girls Volleyball. Programs must be contained within a program category and/or program group. Individual programs cannot be used as program categories or program groups.</p>

The following figure illustrates the relationships between program categories, program groups, and programs:



## Understanding Program Categories

You can change the program category names and create custom program categories by editing the Program Management setup lists. For more information about working with setup lists, see “Working with Program Management Setup Lists” on page 24.

Program Management provides several predefined program categories. These are primarily US federally-managed programs. Predefined program categories include:

Program Category	Types of Programs
Academic Enhancement	Support innovative learning and augment the standard curriculum or enhance student academic performance.
After School Academic	Supplement educational services. These programs are available after regular school hours and do not fall into the Academic Enhancement program category. For example: community work programs; student volunteer programs; or other educational programs with a social component.
After School Athletics	Promote physical education and sports activities that are not part of the standard course curriculum, e.g., school sports teams, cheerleading, and so on.
Early Childhood Education	Enhance school readiness of children. Includes programs such as HeadStart or Title 1. These programs focus on basic skills such as color recognition, number recognition, and basic language skills.
English Language Learners	Support students with limited English skills. These programs focus on increasing the student’s level of proficiency so they are not hindered in the classroom.

Program Category	Types of Programs
Free & Reduced Meals	Provide economically or socially challenged students with access to free or reduced meal programs. Depending on the student's situation, these programs can include other meals and snacks, as well as lunch. These programs monitor USDA meal services. Free and Reduced Meal programs usually require sessions for each school to allow students using the program to be tracked.
Gifted and Talented	Provide an accelerated and enriched curriculum. Students may need to be enrolled in this program before they can be registered for Gifted/Talented classes.
Home/Hospital	Support students unable to attend classes at the physical school location. For example, a student who is hospitalized for an extended time might have a teacher come to their hospital to assist with their schoolwork.
Homeless	Ensure equal access to education for homeless students. Students who are homeless can be given additional learning and support opportunities to help them keep up with their studies.
Migrant Status	Provide opportunities for students who qualify for migrant programs to help them keep up with their studies.
Out of District Placement	<p>Support programs for students requiring non-district services. For example, students with severe disabilities may require access to programs or services which are not available in their home district.</p> <p><b>Note</b> Generally, students are only placed outside their district after the district has tried all available forms of instructional settings (from least restrictive environment to most restrictive) and the results are not effective. Students may also be placed outside the district if the student is deemed dangerous to themselves or others.</p>
Special Services	Track IEP and 504 status students. These programs support students with physical or learning disabilities who require specialized learning environments, such as braille.
Transportation	<p>Provide transportation to/from school for qualifying students who face transport challenges.</p> <p>For more information, see "Setting up Transportation Programs" on page 53.</p> <p><b>Note</b> Transportation program setup is accessed directly from the District Setup page under the District heading, not from Program Setup.</p>

# Searching for Programs

A Program Search panel is available on several pages and enables you to find specific programs. The following table shows the pages that include a Program Search panel and how to navigate to the page:

Page	Navigation
Program Setup	<ol style="list-style-type: none"> <li>1 Log on as a district or school administrator.</li> <li>2 If you logged on as a district administrator, in the control bar, under Admin, click District Setup. OR If you logged on as a school administrator, in the control bar, under Admin, click School Setup.</li> <li>3 On the District Setup or School Setup page, under Program Management, click Program Setup.</li> </ol>
Manage Programs	<ol style="list-style-type: none"> <li>1 Log on as a district or school administrator.</li> <li>2 In the control bar, under Programs, click Manage Programs.</li> </ol>

The Program Search panel provides two ways to search for programs: Basic and Detail. For information about using these search options, see:

- “Using the Basic Search” on page 9
- “Using the Detail Search” on page 12

## Using the Basic Search

Use the Basic search to search by common program features such as program category, start date, or end date.

When you open a page with a Program Search panel, the Basic tab is selected by default.

In a Basic program search, you can enter up to five search criteria and the records in the search results match all defined criteria.

Each criteria has three parts:

- a field name
- an operator
- a value

**Note**

Some operators do not include a Value dropdown. For example, if you select "is not empty" from the Operator dropdown, you cannot specify a value.

The screenshot shows the 'Program Setup' window with the 'Basic' tab selected. The 'Search by:' section contains five rows of search criteria:

- Program category: equals English Language Learners
- Qualified staff last name: contains
- Program group: equals
- Program start date: equals (mm/dd/yyyy)
- Program end date: equals (mm/dd/yyyy)

Below the search criteria is a 'Display All Records' link and a 'Search' button. The 'Search Results' section shows a list of search criteria: 'List: Program category equals "English Language Learners"'. Below this is a 'Selected: 0' indicator and a 'Total: 1' indicator. A table displays the search results:

<input type="checkbox"/>	Program Short code	Program category	Start date	End date	Qualified Staff
<input type="checkbox"/>	ESL One	ESL1	English Language Learners		Calaway, Jerrod, Halloway; Prestridge, Russel; Yother, Leonardo; Wales, Tim;

The following criteria finds programs whose Program Category equals After School Athletics.

- Field Name = Program Category
- Operator = equals
- Value = After School Athletics

The screenshot shows the 'Program Search' window with the 'Basic' tab selected. The 'Search by:' section contains five rows of search criteria:

- Program Category: equals After School Athletics
- Program: equals
- Program Group: equals
- Program Start Date: equals (mm/dd/yyyy)
- School: equals

Below the search criteria is a 'Display All Records' link and a 'Search' button.

Add the following criteria to find After School Athletics programs with at least one session.

- Field Name = Program Session
- Operator = is not empty

The screenshot shows a 'Program Search' window with two tabs: 'Basic' and 'Detail'. Under the 'Basic' tab, there is a 'Search by:' section with five rows of search criteria. Each row consists of a field name dropdown, an operator dropdown, and a value dropdown or text input. The first row is 'Program Category' with operator 'equals' and value 'After School Athletics'. The second row is 'Program Session' with operator 'is not empty'. The third row is 'Program Group' with operator 'equals'. The fourth row is 'Program Start Date' with operator 'equals' and a date input field with a placeholder 'mm/dd/yyyy'. The fifth row is 'School' with operator 'equals'. At the bottom left is a link 'Display All Records' and at the bottom right is a 'Search' button.

**TO PERFORM A BASIC SEARCH:**

- 1 Log on as a district or school administrator.
- 2 Navigate to a page that has a program search panel.  
For more information, see “Searching for Programs” on page 9.
- 3 From the left dropdown in the first row, select a field name.
- 4 From the middle dropdown in the first row, select an operator.

Operator	Finds records where the field...
Contains	Includes the value anywhere in the field.
Does not equal	Is anything but the value.
Ends with	Ends with the value.
Equals	Exactly matches the value.
Is empty	Does not contain a value.
Is not empty	Contains any value.
Starts with	Starts with the value.

- 5 From the left dropdown in the first row, enter or select a value, if applicable.
- 6 To add more search criteria, repeat Steps 3 to 5.
- 7 Click Search.

## Using the Detail Search

Use the Detail search to search by fields within categories. Click the Detail tab to use the Detail search.

In a Detail program search, you can enter multiple search criteria and specify whether returned records match all defined criteria or any defined criteria.

Each criteria has four parts:

- a category
- a field name
- an operator
- a value

The screenshot shows the 'Program Search' window with the 'Detail' tab selected. Annotations include:

- Category:** A dropdown menu currently set to 'Generic'. Annotation: 'Select a category for the fields available from the first dropdown.'
- Field Name:** A dropdown menu currently set to '- Select a field -'. Annotation: 'To search for programs that match all defined search criteria, click All Criteria.'
- Operator:** A dropdown menu. Annotation: 'To search for programs that match at least one of the defined search criteria, click Any Criteria.'
- Value:** A text input field. Annotation: 'Click to add the defined criteria to the Search Criteria.'
- Match:** Radio buttons for 'All Criteria' (selected) and 'Any Criteria'.
- Buttons:** 'Add Criteria', 'Remove', and 'Search'. Annotation: 'Click to search based on entered Search Criteria.'
- Display All Records:** A blue link. Annotation: 'Click to display all programs'
- List:** A dropdown menu currently set to '- Select a search criteria -'. Annotation: 'To use a previously used search criteria, select an option from the dropdown'

**Search Results:**

List: - Select a search criteria -

Selected: 0 | 1 - 30 of 65 | Prev | Next

<input type="checkbox"/>	Location	Student Capacity	# of Participants	# of Applicants	# of Staff
<input type="checkbox"/>	After School Counts	ASC001			
<input type="checkbox"/>	Cypress Elementary	75	11	33	0

The following criteria finds programs called Baseball:

- Category = Program Session School District
- Field Name = Program
- Operator = equals
- Value = Baseball

The screenshot shows the 'Program Search' window with the 'Basic' tab selected. The 'Category' dropdown is set to 'Program Session School District'. Below it, the search criteria are defined as: 'Program' (field name), 'equals' (operator), and 'Baseball' (value). An 'Add Criteria' button is visible to the right of the criteria input fields. Under the 'Search Criteria' section, the 'Match' options are 'All Criteria' (selected) and 'Any Criteria'. A text box displays the criteria: 'Program equals "Baseball"'. At the bottom, there are buttons for 'Display All Records', 'Remove', and 'Search'.

Add the following criteria to find programs whose program equals Baseball AND whose start date equals September 1, 2006.

- Field Name = Start Date
- Operator = is greater than or equal to
- Value = 09/01/2006

The screenshot shows the 'Program Search' window with the 'Basic' tab selected. The 'Category' dropdown is set to 'Program Session School District'. Below it, two search criteria are defined: 'Program Start Date' (field name), 'is greater than or equal to' (operator), and '09/01/2006' (value) with a date format 'mm/dd/yyyy' dropdown. An 'Add Criteria' button is visible to the right of the criteria input fields. Under the 'Search Criteria' section, the 'Match' options are 'All Criteria' (selected) and 'Any Criteria'. A text box displays the criteria: 'Program equals "Baseball"' and 'Program Start Date is greater than or equal to "09/01/2006"'. At the bottom, there are buttons for 'Display All Records', 'Remove', and 'Search'.

**TO PERFORM A DETAIL SEARCH:**

- 1 Log on as a district or school administrator.
- 2 Navigate to a page that has a program search panel.  
For more information, see “Searching for Programs” on page 9.
- 3 Click the Detail tab.
- 4 On the Detail tab, from the Category dropdown, select a category such as:
  - General Program Info
  - Generic
  - Program District Contact
  - Program Session
  - Program State Contact
- 5 From the left dropdown, select a field name.
- 6 From the middle dropdown, select an operator.
- 7 From the right dropdown, enter or select a value, as applicable.
- 8 Click Add Criteria.
- 9 To add more criteria, repeat Steps 4 to 8.
- 10 In Match, select whether you want the results to include programs that match all the defined criteria or at least one of the defined criteria.
- 11 Click Search.

## Including Past and Future Programs in Program Search Results

By default, program search results include only those programs that are active within the working calendar. For example, if you are working in the active calendar, the program search results include programs whose start and end dates fall within the active calendar. If you want to see programs that ended in a previous calendar or start in a future calendar, you can use the show past or future programs option.

**Note**

Past and future programs are shown in italic type on search results pages.

**TO SHOW OR HIDE PAST OR FUTURE PROGRAMS:**

- 1 Log on as a district or school administrator.
- 2 Navigate to a page that has a program search panel.  
For more information, see “Searching for Programs” on page 9.

- 3 From the Edit menu, click one of the following options:

Option	Description
Show Past Programs	Available if past programs are currently hidden. If you select this option, the search results will include programs whose end dates are prior to the current calendar start date.
Hide Past Programs	Available if past programs are currently shown. If you select this option, the search results will not include programs whose end dates are prior to the current calendar start date.
Show Future Programs	Available if future programs are currently hidden. If you select this option, the search results will include programs whose start dates are past the current calendar end date.
Hide Future Programs	Available if future programs are currently shown. If you select this option, the search results will not include programs whose start dates are past the current calendar end date.



# WORKING IN THE PLANNING CALENDAR

After your district or school creates a planning calendar, you can set up program management for the next school year in the planning calendar. When you create a district or school planning calendar, existing programs are available in the planning calendar. Whether sessions are created for the program in the planning calendar and how participants are handled depends on how the planning calendar options are set for the session. For more information, see “Setting Planning Calendar Options” on page 17.

Since programs are date-based rather than calendar-specific, changes made in any calendar apply to the overall program setup and affect the program offered in all the calendars included within the program start and end dates. For example, if a program start date is in the current active calendar and the end date is in the future (after the planning calendar), when you make changes to the program setup in the planning calendar, the changes apply to the overall program and affect the program in the active calendar, planning calendar, and future calendars. Regardless of whether you are working in the active calendar or the planning calendar, you are working with the same information and changes update the overall program setup.

If you want to change a program in one calendar only, create a new program to start in that calendar. For example, if you want to change the program setup for the next school year, end the program as of the end of the year and copy the program setup to the planning calendar. For more information, see “Copying Program Setup” on page 71.

Program sessions are calendar-specific. Program sessions are copied to the planning calendar during the first nightly process only. Changes to sessions in the active calendar are not copied to the planning calendar during subsequent nightly processes. Changes to sessions in the planning calendar are not reflected in the active calendar. If some program sessions will not be offered in the next school year, after you create the planning calendar, delete those sessions for the program in the planning calendar.

## Note

When eligibility rules are copied to the planning calendar, either using copy program setup or when a planning calendar is created, the rule start and end dates are copied as they are defined. You must manually adjust the dates for rules in the new program setup.

## Setting Planning Calendar Options

Planning calendar options determine how program sessions are handled during Next-Year Preparation. You can set planning calendar options from the Sessions/Locations page for program sessions that are active within the working calendar.

Since program sessions cannot cross calendar years, an end date is set for the session at the end of the district calendar. Use the planning calendar options to specify how program sessions and participants are handled in the planning calendar.

**Note**

When you are working with this page to set planning calendar options, you may want to display the Planning Calendar Option and Requested School Controlled columns. To change displayed columns, from the Edit menu, click Choose Columns. Move the columns you want to display to the Selected Columns list. Click OK.

For detailed information about Next-Year Preparation and how students are enrolled in schools and assigned to programs in the planning calendar, see the Chancery SMS Next-Year Preparation and Year-End Processing Guide.

**TO SET PLANNING CALENDAR OPTIONS FOR A PROGRAM SESSION:**

- 1 Log on as a district administrator.
- 2 In the control bar, click District Setup.
- 3 On the District Set up page, under Program Management, click Program Setup.
- 4 On the Program Setup page, search for programs and select the program you want to set up planning calendar options for.
- 5 From the Actions menu click Edit Program Setup.
- 6 In the control bar, click Sessions/Locations.
- 7 On the Sessions/Locations page, select a session.
- 8 From the Actions menu, click “Set Planning Calendar Option”.
- 9 On the Set Planning Calendar Options page, from the Planning Calendar Option dropdown, select one of the following options:

Options	Description
Create session/roll students as participants	A new session is created in the planning calendar. Program participants are added as participants in the new program with the following exceptions: <ul style="list-style-type: none"> <li>• If the student is promoted from the graduating grade for the school, the student is not enrolled in the school and not added as a participant in the program.</li> <li>• If the student is not active in the program at the end of the year, the student is not added as a participant in the new session.</li> </ul>
Create session/roll students as applicants	A new session is created in the planning calendar. Applications are created for current program participants and their eligibility status' are cleared.

Options	Description
Create session/do not roll students	A new session is created in the planning calendar. Students are not added as participants or applicants for the new session.
Do not create session/students are removed	A new session is not created in the planning calendar. An exit date is entered for students currently participating in the program.

- 10 To prevent users from changing the student’s requested school for the school enrollment associated with this program, on the Add/Edit Status Code page, select the “Planning calendar ‘Requested School’ controlled by program manager” option.

If this program allows general entry into the school, i.e., it does not have eligibility criteria or capacity limits, do not select this option.

- 11 To create applications for the new session in the planning calendar for existing applicants, select the Roll Existing Applicants option.

**Note**

This option is only available if you select either “Create session/roll students as participants” or “Create session/roll students as applicants” options from the Planning Calendar Option dropdown.

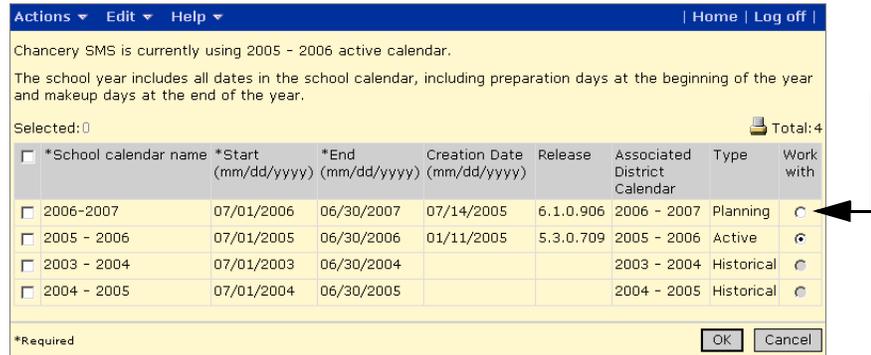
If participants are rolled as participants, applicants are added to the program queue and their eligibility status settings (rank, queue status, and eligibility status) are maintained. If participants are rolled as applicants, two queues are created. Participants are copied to the “Participants rolled as applicants queue” and their eligibility status is reset. Applicants are copied to the new session queue and their eligibility status settings are maintained.

- 12 Click OK.

## Switching to the Planning Calendar

- 1 Log on as a district or school administrator.
- 2 From the Actions menu, click Switch Calendar.

- 3 On the School Calendars page, in the Work With column, click the button next to the calendar you want to work with.



- 4 Click OK.

# SETTING UP DISTRICT PROGRAMS

All programs must be defined at the district and assigned to schools. Chancery SMS includes several predefined program categories for some of the more common US programs, many of which are federally authorized, funded, and audited. When setting up programs, you may use predefined programs provided with Chancery SMS, copy predefined programs and alter them to meet your needs, or create new programs.

Before you begin setting up programs, determine your district's program needs. Consider the following questions:

- What programs will be offered in your district?
- Which school or facilities will offer specific programs?
- Do you want to restrict the enrollment in certain schools to students who are accepted into specific programs?
- Will some schools provide transportation to students enrolled in programs at the school?
- Do you want Chancery SMS to consider a student program enrollment when loading student schedules or assigning students to homerooms? (Use class and homeroom constraints to do this.)

To set up programs at the district, complete the following overall procedure:

**Step 1:** Define district preferences for program management. See “Setting Program Management District Preferences” on page 22.

**Step 2:** Define Program Management setup lists. See “Working with Program Management Setup Lists” on page 24.

**Step 3:** Set up off-campus facilities (if required). For more information, see “Setting Up Off-Campus Facilities” on page 32.

**Step 4:** Create programs and assign them to schools. See “Creating Programs” on page 32.

**Step 5:** Set up transportation programs (if required). See “Setting up Transportation Programs” on page 53.

**Step 6:** Create class and homeroom constraints for program classes and assign them to homerooms and courses (optional). See “Setting up Classes for Programs at the District” on page 75.

## Permissions to Set Up District Programs

To	You need this permission	Set to
Define Program Management setup lists (Add, Edit, Delete items)	Setup Lists > Program Management > <i>Setup List Name</i>	Delete
Add, edit, and copy program setup information	Program Category - <i>Category Name</i> > District Program Setup	Edit
View program setup information (no edit)	Program Category - <i>Category Name</i> > District Program Setup	View
Delete program setup information	Program Category - <i>Category Name</i> > District Program Setup	Delete
Remove staff from programs	Program Category - <i>Category Name</i> > District Program Setup	Delete
Delete eligibility rules	Program Category - <i>Category Name</i> > District Program Setup	Delete
Set up transportation programs.	Program Category - Transportation > Transportation Setup	Edit

By default, district administrators can set up and define programs at the district and assign them to schools.

For more information about working with permissions, see the Chancery SMS Permissions Guide and “Controlling User Access” in the Chancery SMS District Administration Guide.

## Setting Program Management District Preferences

Through district preferences, you can set options that control how program management works in your district.

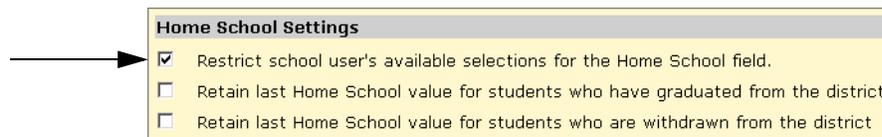
To	Set this option
Filter the options available from the Home School dropdown to exclude other schools in the district for school users	<p>Select the “Restrict school user’s available selections from the Home School field” option.</p> <p>When selected, this options limits the schools a school user can select from the Home School dropdown when enrolling or transferring students, so school users cannot select a school in the district other than their own or N/A.</p> <p><b>Note</b> To set a student’s home school, school users must also have the “Modify Home School” permission set to yes and have access to either the Student Demographics page or Enrollment Status page.</p>

To	Set this option
Require users to enter a reason for overriding a student’s calculated rank value.	Select the “Required for Wait List Rank Overrides” option If selected, school or district administrators must enter a rank override reason when changing a student’s calculated rank value. If this option is not selected, users can enter a rank override reason, but the field is not required. For more information, see “Overriding Eligibility Criteria” on page 159 and “Assigning Specific Ranks” on page 161.
Limit the number of students a home/hospital instructor can work with at one time	Specify a numeric value in the “Number of students a Home Hospital instructor can provide services to, at any one time” field. This option allows you to specify the maximum number of students a home/hospital instructor can be assigned to at any one time.

**TO SET THE DISTRICT PREFERENCES FOR PROGRAM MANAGEMENT:**

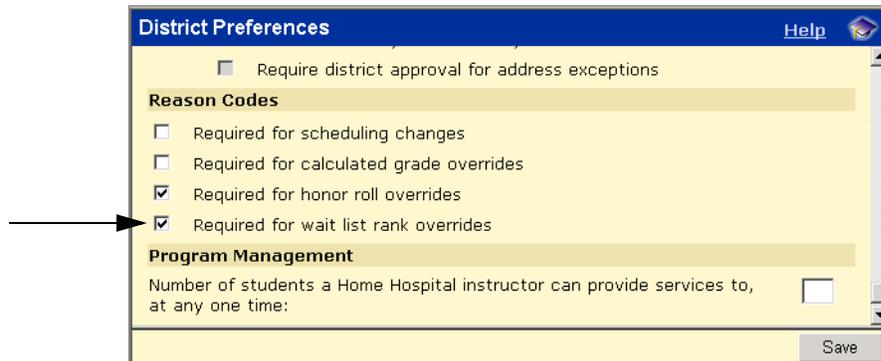
- 1 Log on as a district administrator.
- 2 In the control bar, click District Setup.
- 3 On the District Setup page, under District, click Preferences.
- 4 On the District Preferences page, scroll down to the Home School Settings section.
- 5 To prevent school users from changing student home schools to other schools in the district, in the Home School Settings section, select “Restrict school user’s available selections from the Home School field”.

When this option is selected, school users are only able to select their school and N/A from the Home School dropdown for students.

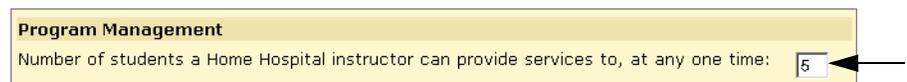


- 6 On the District Preferences page, scroll down to the Reason Codes section.

- 7 To require that users select a reason when overriding calculated ranks, select the “Required for wait list rank overrides” option.



- 8 On the District Preferences page, scroll down to the Program Management section.
- 9 To restrict the number of students a home/hospital instructor can work with at one time, under Program Management, in the “Number of students a Home Hospital instructor can provide services to, at any one time” field, enter a number.



- 10 Click Save.

## Working with Program Management Setup Lists

Program Management uses setup lists to make data entry easier and ensure consistent spelling and terminology.

For example, when you enter a program category you can select a category from a dropdown rather than manually entering the entire name. The contents of the Program Category dropdown are defined in the Program Category setup list. Each setup list is composed of any number of items. For example, “After School Athletics” and “Homeless” would be items in the Program Category setup list.

You can add new items to set up lists, change or delete existing items, and merge items, as required.

For more information about working with setup lists, see “Setup Lists and Setup List Pairs” in the Chancery SMS District Administration Guide.

Program Management includes the following setup lists:

<b>Setup List</b>	<b>Description</b>
Acceptance Status	<p>Items specify student status' in out-of-district placement programs, i.e., their enrollment status in the private facility.</p> <p>Setup list items can be selected from the Acceptance Status dropdown on the out-of-district placement Program Details page.</p>
Accommodations	<p>Items identify requirements needed by students to accommodate for physical or emotional conditions</p> <p>Setup list items can be selected from the Accommodations dropdown on the Transportation Program Details page.</p>
Activity	<p>Items identify types of work or main areas of study students focus on when in programs</p> <p>Setup list items can be selected from the Activity dropdown on the After School Academics Program Details page.</p>
Aide Qualification	<p>Items identify qualification statuses of students who are entitled to receive state transportation aide. For example, Does not qualify, Regular aid, Special education aid, and so on.</p> <p>Setup list items can be selected from the Aide Qualification dropdown on the Transportation Details page.</p>
Approval Status	<p>Items specify student status' for receiving parent/guardian approval for ELL services.</p> <p>Setup list items can be selected from the Approval Status dropdown on the English Language Learners Program Details page.</p>
Certification Type	<p>Items identify how students can certify for free and reduced meals. For example, food stamps, income, and so on.</p> <p>Setup list items can be selected from the Certification Type dropdown on the Free &amp; Reduced Lunch Program Details page.</p>
Citizenship Status	<p>Items specify the citizenship status' that students might have. For example, citizen, dual national, resident alien, and so on.</p> <p>Setup list items can be selected from the Citizenship Status dropdown on the Student Demographics page.</p>
Components	<p>Items specify care that can be provided during the ECE programs. For example, Nutritional Services, Social Services, and so on.</p> <p>Setup list items can be selected from the Components dropdown on the Early Childhood Education Program Details page.</p>
Condition	<p>Items specify special conditions or groups students can participate in and which have an effect on an after-school athletics program. For example, bilingual, special education, and so on.</p> <p>Setup list items can be selected from the Condition dropdown on the After School Academics Program Details page.</p>

Setup List	Description
Contacts Role	<p>Items identify roles played by district or state contact.</p> <p>Setup list items can be selected from the Role dropdown on the district contact or state contact pages.</p>
Disability	<p>Items specify special education disabilities or related conditions. For example, autistic, visually impaired, and so on.</p> <p>Setup list items can be selected from the Disability dropdown on the Special Services Program Details page and from the Primary Disability dropdown on the Out of District Placement Program Details page.</p>
Duration	<p>Items specify lengths of time students can remain eligible for Free &amp; Reduced Meals. For example, annual, temporary, and so on.</p> <p>Setup list items can be selected from the Duration dropdown on the Free &amp; Reduced Lunch Program Details page.</p>
Dwelling Type	<p>Items specify categories or types of residences where students might reside. For example, abandoned building, car, and so on.</p> <p>Setup list items can be selected from the Dwelling Type dropdown on the Homeless Program Details page.</p>
Employment Type	<p>Items identify industries of qualifying work sought by a family's move as it relates to the principal means of livelihood for the student/family. For example, seasonal agriculture, temporary fishing, and so on.</p> <p>Setup list items can be selected from the Employment Type dropdown on the Migrant Status Program Details page.</p>
Family Day Care	<p>Items specify types of after-school care student might receive. For example, center-based, relative, and so on.</p> <p>Setup list items can be selected from the Family Day Care dropdown on the Early Childhood Education Program Details page.</p>
Focus	<p>Items specify services that might be provided to students to address specific developmental areas. For example, disability developmental, typically developmental, and so on.</p> <p>Setup list items can be selected from the Focus dropdown on the Early Childhood Education Program Details page.</p>
Funding Source	<p>Items identify types of funding sources available for programs. For example, individual, state, and so on.</p> <p>Setup list items can be selected from the Source dropdown on the Program Setup &gt; Funding Costs page.</p>
Highest Education Level	<p>Items identify education levels. For example, high school graduate, college graduate, and so on.</p> <p>Setup list items can be selected in the Family Information section from the Highest Education Level dropdown on the Early Childhood Education Program Details page.</p>

Setup List	Description
Instructional Group	<p>Items define instructional subgroups in which student receiving ELL/ESL services can be placed. For example, bilingual, sheltered, immersion, and so on.</p> <p>Setup list items can be selected from the Instructional Group dropdown on the English Language Learners Program Detail page.</p>
Join Type	<p>Items identify underlying purposes, as they relate to a “to join” conditions, for student/family’s qualifying moves. For example, to join parent, to join spouse, and so on.</p> <p>Setup list items can be selected from the Join Type dropdown on the Migrant Status Program Details page.</p>
Language Approach	<p>Items identify languages teachers and assistants may use during instruction. For example, dual language, mostly English, and so on.</p> <p>Setup list items can be selected from the Language Approach dropdown on the Early Childhood Education Program Detail page.</p>
Language Proficiency Levels	<p>Items identify language proficiency levels. For example, advanced, fluent, negligible, and so on.</p> <p>Setup list items can be selected from the Native Lang Proficiency, Initial Eng Proficiency, and Reassessed Eng Proficiency dropdowns on the English Language Learners Program Details page.</p>
Length of Day	<p>Items specify amounts of time for which students might receive services. For example, half day - AM, full day, and so on.</p> <p>Setup list items can be selected from the Length of Day dropdown on the Early Childhood Education Program Detail page.</p>
Level of Play	<p>Items specify levels of play or years for sports students might play. For example, freshman, junior, varsity, and so on.</p> <p>Setup list items can be selected from the Level of Play dropdown on the After School Athletics Program Detail page.</p>
Medical Diagnosis	<p>Items specify the illnesses or conditions physicians state as the reason student may be homebound or in the hospital. For example, arthritis, leukemia, and so on.</p> <p>Setup list items can be selected from the Medical Diagnosis list mover on the Home/Hospital Program Detail page.</p>
Migrant Classification Subgroup	<p>Items specify migrant student status’ as specified by migratory pattern and industry by which the student/family is influenced. For example, interstate agriculture, formerly fishing, and so on.</p> <p>Setup list items can be selected from the Migrant Classification Subgroup dropdown on the Migrant Status Program Details page.</p>
Migrant Status	<p>Items specify migrant statuses. For example, currently a migratory child, formerly a migratory child, and so on.</p> <p>Setup list items can be selected from the Migrant Status dropdown on the Student Demographics page.</p>

<b>Setup List</b>	<b>Description</b>
Minor\Adult Status	<p>Items specify legal adulthood statuses as specified by state law. For example, unaccompanied youth, legal adult, and so on.</p> <p>Setup list items can be selected from the Minor\Adult Status dropdown on the Student Background Data page.</p>
Move Purpose	<p>Items identify underlying purposes, as they relate to specific employment conditions, of students/families qualifying moves. For example, seek, obtain, and so on.</p> <p>Setup list items can be selected from the Move Purpose dropdown on the Migrant Status Program Detail page.</p>
Nonacceptance Reason	<p>Items specify reasons an out-of-district facility might not accept a student’s referral. For example, over capacity, services not available, and so on.</p> <p>Setup list items can be selected from the Nonacceptance Reason dropdown on the Out of District Placement Program Detail page.</p>
Off-campus Facility	<p>Items define the names of the off-campus facilities.</p> <p>Setup list items can be selected from the Off-Campus Facilities list mover on the Session Detail page.</p>
Optional Support	<p>Items identify services students might receive as part of the ELL program. For example, resource center, tutoring, and so on.</p> <p>Setup list items can be selected from the Optional Support list mover on the English Language Learners Program Detail page.</p>
Other Benefits	<p>Items identify national school lunch program benefits students might receive in addition to a free and reduced lunch program. For example, elementary breakfast, snacks, and so on.</p> <p>Setup list items can be selected from the Other Benefits list mover on the Free &amp; Reduced Meals Program Detail page.</p>
Participation Level	<p>Items specify amounts of involvement parents or guardians might indicate they have with their child in an educational setting. For example, sometimes, frequent, and so on.</p> <p>Setup list items can be selected from the Participation Level dropdown on the Early Childhood Education Program Detail page.</p>
Participation Reason	<p>Items specify reasons students might be placed in an academic enhancement program. For example, low test scores, parent/guardian preference, and so on.</p> <p>Setup list items can be selected from the Participation Reason dropdown on the Academic Enhancement Program Detail page.</p>

Setup List	Description
Program	<p>Items define the names of the individual programs. For example, sr. girls volleyball, advanced math, and so on.</p> <p>Setup list items can be selected from the Program dropdown on the following pages:</p> <ul style="list-style-type: none"> <li>• General Information</li> <li>• Copy Program</li> <li>• Add/Edit Constraints</li> <li>• Add/Edit Queue</li> <li>• Apply to Program</li> <li>• Add Status Code (when enrolling in a school that uses controlled enrollment)</li> <li>• Transfer to School (when transferring to a school that uses controlled enrollment)</li> </ul>
Program Category	<p>Items define the categories that programs might fall into. Chancery SMS includes several predefined categories. For example, academic enhancement, home/hospital, and so on.</p> <p>Setup list items can be selected from the Program Category dropdown on the following pages:</p> <ul style="list-style-type: none"> <li>• General Information</li> <li>• Copy Program</li> <li>• Add/Edit Constraints</li> <li>• Add/Edit Queue</li> <li>• Apply to Program</li> <li>• Add Status Code (when enrolling in a school that uses controlled enrollment)</li> <li>• Transfer to School (when transferring to a school that uses controlled enrollment)</li> </ul> <p><b>Note</b> When creating new program categories, limit the number of characters in the description to 25 or less.</p>
Program Documentation	<p>Items specify documents that might be required for enrollment in programs. For example, program application, physical exam, and so on.</p> <p>Setup list items can be selected from the Required Documentation list mover on the General Information page.</p>
Program Exit Reason	<p>Items specify reasons a student might leave a program. For example, became ineligible, excessive absence, parent request, and so on.</p> <p>Setup list items can be selected from the Exit Reason list mover on the Remove From Program page.</p>

Setup List	Description
Program Group	<p>Items identify groups that programs may be organized into. For example, volleyball, girls sports, and so on. Program groups are optional.</p> <p>Setup list items can be selected from the Program Group dropdown on the following pages:</p> <ul style="list-style-type: none"> <li>• General Information</li> <li>• Copy Program</li> <li>• Add/Edit Constraints</li> <li>• Add/Edit Queue</li> <li>• Apply to Program</li> <li>• Add Status Code (when enrolling in a school that uses controlled enrollment)</li> <li>• Transfer to School (when transferring to a school that uses controlled enrollment)</li> </ul>
Program Interaction	<p>Items identify other programs that might be combined with the program. For example, elementary breakfast, snacks, and so on.</p> <p>Setup list items can be selected from the Interaction with Other Programs list mover on the General Information page.</p>
Program Override Reason	<p>Items specify reasons a user might enroll a student even though they do not meet the defined eligibility requirements, i.e., their status is not “Offered”. For example, economic need, sibling enrollment, and so on.</p> <p>Setup list items can be selected from the Program Override Reason dropdown on the Add Status Code when you enroll students into a school that uses controlled enrollment or the or Assign to Program pages when you assign students to programs.</p>
Program Year	<p>Items define amounts of time students might have been in an ELL program. For example, 1, 2, and so on.</p> <p>Setup list items can be selected from the Program Year dropdown on the English Language Learners Program Detail page.</p>
Recovery Location	<p>Items specify locations where students might be rehabilitated after/during their illness or disability. For example, home, hospital, rehab center, and so on.</p> <p>Setup list items can be selected from the Recovery Location dropdown on the Home\Hospital Program Detail page.</p>
Related Service	<p>Items specify standard services that might be provided to students with disabilities. For example, assistive devices, occupational therapy, and so on.</p> <p>Setup list items can be selected from the Related Service dropdown on the Special Services Program Detail page.</p>
Resides With	<p>Items specify roles of individuals student might live with. For example, mother, grandfather, and so on.</p> <p>Setup list items can be selected from the Resides With dropdown on the Homeless Program Detail page.</p>

Setup List	Description
Run Type	<p>Items specify types of transportation routes that are used to transport students. For example, Elementary Disabled, Secondary Regular, Field Trip, and so on.</p> <p>Setup list items can be selected from the Run Type list mover on the Transportation Detail page.</p>
Service Type	<p>Items specify types of services providers might offer students who cannot attend school because of a disability or illness. For example, academic instruction, and so on.</p> <p>Setup list items can be selected from the Service Type dropdown on the Home\Hospital Program Detail page.</p>
Services	<p>Items specify activities or programs students might receive in the Migrant Program. For example, portable learning, nutrition, and so on.</p> <p>Setup list items can be selected from the Services list mover on the Migrant Status Program Detail page.</p>
SPED Environment	<p>Items specify special education environments, with or without integrated activities, that students might work in. For example, consultation to regular teacher, less than 50% special ed in regular classroom, and so on.</p> <p>Setup list items can be selected from the SPED Environment dropdown on the Special Services Program Detail page.</p>
Status Change	<p>Items specify types of changes students might have in their meal eligibility. For example, free to denied, reduced to free, and so on.</p> <p>Setup list items can be selected from the Status Change dropdown on the Free &amp; Reduced Meals Program Detail page.</p>
Study Requirements	<p>Items specify tasks or additional work students must complete to participate in the sport program. For example, study plan, tutoring, and so on.</p> <p>Setup list items can be selected from the Study Requirements dropdown on the After School Athletics Program Detail page.</p>
Suggested Placement	<p>Items specify the names of facilities where students might receive instruction or be moved to for out-of-district placements.</p> <p>Setup list items can be selected from the Suggested Placement dropdown on the Out of District Placement Program Detail page.</p>
Test Accommodations	<p>Items specify special conditions that might be enabled for Special Services students during tests. For example, aide, special equipment, and so on.</p> <p>Setup list items can be selected from the Test Accommodations dropdown on the Special Services Program Detail page.</p>

Setup List	Description
USDA Federal Income Guidelines	Items specifies USDA Federal income guidelines that qualify students for free or reduced meals. For example, meets income; free meals, meets income; reduced meals, and so on.  Setup list items can be selected from the USDA Income Guidelines dropdown on the Student Background Data page.
Vehicles	Items specify vehicle types that might be used to transport students.  Setup list items can be selected from the Vehicles dropdown on the Transportation Program Detail page.

## Setting Up Off-Campus Facilities

In some cases, programs are offered at off-campus facilities rather than at schools in the district. How you set up off-campus facilities depends on how you need to manage the facility.

You can set up off-campus facilities in the following ways:

If	Do this
You do not need to manage the scheduling or attendance at the facility	Add the facility name to the Off Campus Facility setup list.  When you create a program session, under Assign to Off Campus Facilities, from the Available list, select the required facility and move it to the Selected list.
You need to manage attendance, scheduling and so on	Set up the off-campus facility as a school in the district and assign the program session to the school.  For information about setting up new schools, see the Chancery SMS School Setup Guide.
You need to manage attendance, scheduling, and so on, but are not concerned about interlocking with other schools	Set up the facility as a building or room within an existing school and assign the program to the existing school.  For more information about setting up buildings and rooms, see the Chancery SMS School Setup Guide.

## Creating Programs

A district administrator creates the programs that will be offered at the district and assigns them to the specific schools that will provide the services.

### Note

Before you create programs, make sure the Program Management setup lists are correctly defined and complete. For more information, see “Working with Program Management Setup Lists” on page 24.

To create programs, complete the following overall steps:

- “Step 1: Enter General Information” on page 33
- “Step 2: Add Sessions/Locations” on page 36
- “Step 3: Add District and State Contacts” on page 38
- “Step 4: Enter Funding/Costs Information” on page 40
- “Step 5: Assign Staff” on page 42
- “Step 6: Define Eligibility Rules” on page 43

**Note**

You can work with programs in both the active and planning calendars. However, since program setup is date-based rather than calendar-specific, changes apply to the overall program and changes made in any calendar affect the program for all calendars within the program start and end dates.

## Step 1: Enter General Information

General information defines basic information about programs, such as their name, category, and the dates they are offered within the district.

**TO ENTER GENERAL INFORMATION:**

- 1 Log on as a district administrator.
- 2 In the control bar, under Admin, click District Setup.
- 3 On the District Setup page, under Program Management, click Program Setup.
- 4 On the Program Setup page, from the Actions menu, click Add Program Setup.

The General Info page opens.

- 5 On the General Information page, enter the following information, as required:

Field	Description
Program category	Select a Program Category.
Program	Select a program. The options available depend on the program selected from the Program Category dropdown.
Program Group	If required, select a program group.
Program Short Code	Displays the program short code defined in the Program setup list for the selected program.
Program State Short Code	Displays the program state short code defined in the Program setup list for the selected program.
Additional Description	Enter any additional information about the program.
Allow Student Assignment	Select this option to display the program on the Manage Programs page and allow students to be assigned to the program. <b>Note</b> If this option is not selected, the program is not included in the program search results when you manage programs.
Start Date	Enter the date the program begins accepting applications (using the format mm/dd/yyyy).
End Date	Enter the date the program stops accepting applications (using the format mm/dd/yyyy).

Field	Description
Available Grade Levels	Select one or more grade levels for which the program is recommended.  <b>Note</b> These values are used for reference only. To restrict a program to a specific grade level, you must create an eligibility rule. For more information, see “Step 6: Define Eligibility Rules” on page 43.
Use grades for sessions	To restrict the grades available on the Session Details page to the grades specified in the Available Grade Level field, select this option.
Control Enrollment	If this program will be used to control enrollment at schools, select this option.  For more information about controlled enrollment at schools, see “Controlling Enrollment in Schools” on page 56.
Create AV Exception	Applies to schools using address validation.  If the Control Enrollment option is selected and you want Chancery SMS to automatically create preapproved address validation exceptions for students who are offered positions in schools that are not their zoned schools, select this option.  <b>Note</b> This option only applies to programs that control enrollment in schools.
Instructional Minutes by Class/Student	For reporting purposes, enter the number of minutes students in the program class are expected to receive each day.
Instructional Minutes by School Year/Student	For reporting purposes, enter the number of minutes students in this program are expected to receive during the school year.
Required Documentation	Select any documents students must submit before they can be offered a position in the program.  <b>Note</b> These values are for reference only and do not affect student eligibility for the program. To base program eligibility on documents received, create an eligibility rule. For more information, see “Step 6: Define Eligibility Rules” on page 43.
Interaction with Other Programs	Select any programs that interact with this program. For example, if meals will be served during a program.  <b>Note</b> These values are for reference only. Students must apply and be offered and assigned to each program individually.

- 6 To save and continue creating the program, click Apply. Then continue with Step 2.

OR

To save and return to the Program Setup page, click OK.

## Step 2: Add Sessions/Locations

Sessions define the date, times, and locations where programs are offered within the district. You can assign programs to schools or to off-campus facilities.

### Note

If you plan to assign programs to off-campus facilities, set up these facilities before you add session and locations. For more information, see “Setting Up Off-Campus Facilities” on page 32.

When you create a program, Chancery SMS automatically creates a single session for the program. You can use this session or create additional sessions to assign the program to schools or off-campus facilities.

Program sessions are calendar specific and cannot cross calendars. They must start and end within the same calendar year. If the program setup dates cross calendars, the dates for the initial session are adjusted to fall within one calendar.

### Note

If the program starts in a future calendar, i.e., after the planning calendar end date, sessions are not created.

Program setup start date	Program session end date
within the active calendar	adjusted to the active calendar end date
within the planning calendar	adjusted to the planning calendar end date

### TO ADD SESSIONS AND LOCATIONS:

- 1 In the control bar, click Sessions/Locations.



- 2 Do one of the following:

To	Do this
Modify the system-created session	<ol style="list-style-type: none"> <li>1 Select the session.</li> <li>2 From the Actions menu, click Edit Program Session.</li> </ol>
Add a new session	<ul style="list-style-type: none"> <li>• From the Actions menu, click Add Program Session.</li> </ul>

The Session Details page opens.

- 3 On the Session Details page, under Program Session Details, enter the following information, as required:

Field	Description
Program session	Enter a program session name.
Start date	<p>Enter the date the session starts (using the format mm/dd/yyyy).</p> <p>The session start date must be on or after the program enrollment start date set on the General Information page and both the start and end dates for the session must be in the same calendar. Sessions cannot cross calendars.</p> <p>Schools assigned this program session can change the session start date for their school.</p> <p>For more information, see “Entering and Editing School Setup Information” on page 86.</p>
End date	<p>Enter the date the session ends (using the format mm/dd/yyyy).</p> <p>The session end date must be on or before the program enrollment end date set on the General Information page and both the start and end dates for the session must be in the same calendar. Sessions cannot cross calendars.</p> <p>Schools assigned this program session can change the session end date for their school.</p> <p>For more information, see “Entering and Editing School Setup Information” on page 86.</p>

Field	Description
Planning Calendar Option	Select how this program session will be handled in planning calendars. For more information, see “Setting Planning Calendar Options” on page 17.
Planning Calendar “Requested School” Controlled by Program Management	For controlled-enrollment programs, to prevent users from changing the student’s requested school for the school enrollment associated with this program, on the Add/Edit Status Code page, select this option. If this program allows general entry into the school, i.e., it does not have eligibility criteria or capacity limits, do not select this option.
Available Grade Levels	Specify one or more grade levels for which the program session provides services. If the “Use the selected grade for sessions” option is selected on the General Information page, the grades available in this list are restricted to the grade levels selected on the General Information page. If the “Use the selected grade for sessions” option is not selected on the General Information page, all district grade levels are available in this list. <b>Note</b> These values are for reference only. If you want to restrict the program session to students in specific grades, you must use eligibility rules. For information, see “Step 6: Define Eligibility Rules” on page 43.

- 4 On the Session Details page, under Assign to Schools, search for schools.
- 5 From the Available list, select the schools you want to assign the session to and click Add.
- 6 To assign a program to an off-campus facility, under Off-Campus Facilities, from the Available list, select the facility and move it to the Selected list.

For more information about using off-campus facilities, see “Setting Up Off-Campus Facilities” on page 32.

- 7 To save and continue setting up the program, click Apply. Continue with Step 3.

OR

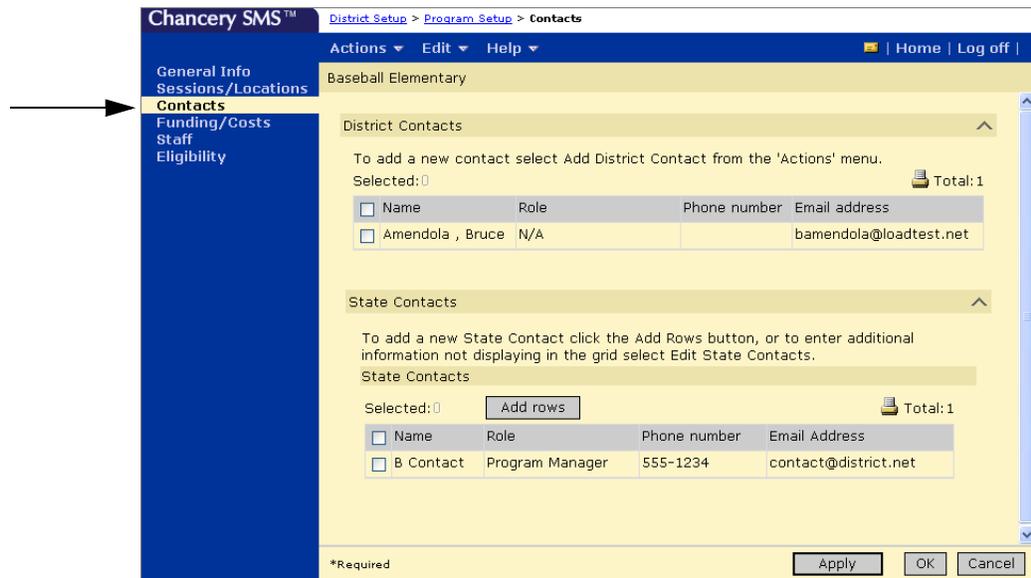
To save and return to the Session/Locations page, click OK.

### Step 3: Add District and State Contacts

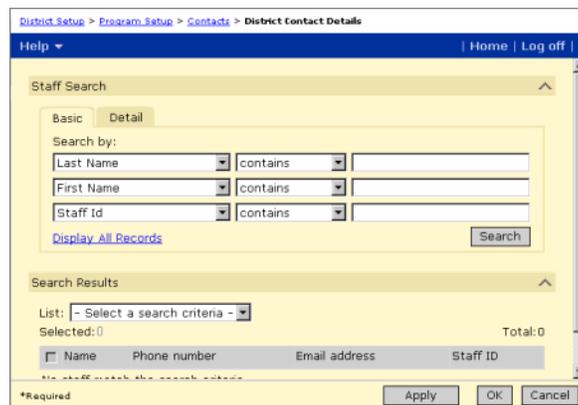
You can specify contact information for people responsible for the program at the district and state level. When you set up programs at schools, you can also add school program contacts. For more information, see “Setting Up School Information” on page 86.

**TO ENTER DISTRICT AND STATE CONTACTS:**

- 1 In the control bar, click Contacts.



- 2 On the Contacts page, from the Actions menu, click Add District Contact.
- 3 The District Contact Details page opens.



- 4 On the District Contact Details page, use the Basic or Detail Staff search to search for District Contacts.
  - 5 From the search results, select a district contact.
  - 6 To save and add another district contact, click Apply.
- OR
- To save and return to the Contacts page, click OK.
- 7 On the Contacts page, from the Actions menu, click Add State Contacts.

- 8 On the State Contacts page, enter the following information, as required:

Field	Description
Name	Enter the contact's name.
Role	Select role the contact has for the program.
Phone number	Enter the contact's phone number.
Email	Enter the contact's email address.
Street Address	Enter the contact's street address.
City	Enter the contact's city.
State	Enter the contact's state.
Zip Code	Enter the contact's zip code.

- 9 Click OK.
- 10 To save and continue setting up the program, click Apply. Continue with Step 4.

OR

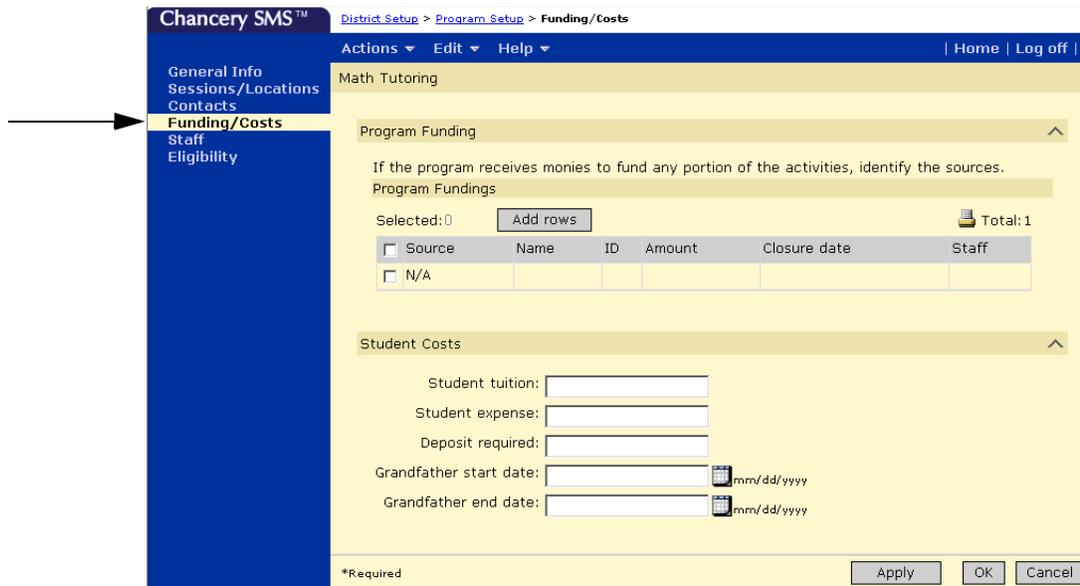
To save and return to the Program Setup page, click OK.

## Step 4: Enter Funding/Costs Information

You can indicate whether funding is available for the program, as well as whether students will have additional costs while attending the program.

**To ENTER INFORMATION ABOUT PROGRAM FUNDING SOURCES AND COSTS:**

- 1 In the control bar, click Funding/Costs.



- 2 On the Funding/Costs page, from the Actions menu, click Add Program Fundings.

**Note**

You can also add funding information directly in the program funding table. Click the Add Rows button to add rows to the table, then select the row and enter the funding information.

- 3 On the Add Program Fundings page, enter the following information, as required:

Field	Description
Source	Select the funding source (e.g., Federal).
Name	Enter the name of the individual, entity, or agency providing the funding.
ID	Enter the identification number of the funding source.
Amount	Enter the amount of money being received from the grant or funding source.
Closure	Specify the date you expect the funding program will close.
Staff	Enter the number of instructors that can be funded through this source.

- 4 Click OK.

- 5 On the Funding/Costs page, under Student Costs, enter the following information, as required:

Field	Description
Student tuition	Enter the amount of money the student must pay either before or during program participation.
Student expense	Enter the amount of money the student must pay either before or during the program participation for supplies and other expenses.
Deposit required	Enter the amount of money the student must pay in advance to secure their position in the program.
Grandfather start date	If applicable, enter the start date for the time period during which the students in the program were not required to pay tuition, expenses, or deposits.
Grandfather end date	If applicable, enter the end date for the time period during which the students in the program were not required to pay tuition, expenses, or deposits.

- 6 To save and continue setting up the program, click Apply. Continue with Step 5.

OR

To save and return to the Program Setup page, click OK.

## Step 5: Assign Staff

At the district, you can specify which staff members are qualified and available to offer program instruction. When schools set up the programs at their school, they assign specific staff to programs offered at their school. For more information about assigning staff to programs at schools, see “Assigning Staff to Programs” on page 87.

### Note

Before you begin, ensure that all staff are set up in Chancery SMS. Only district administrators can add or edit staff records. For more information about working with staff records, see the Chancery SMS District Administration Guide.

**To ASSIGN STAFF TO PROGRAMS:**

- 1 In the control bar, click Staff.

Chancery SMS™ District Setup > Program Setup > Staff

Help | Home | Log off

General Info  
Sessions/Locations  
Contacts  
Funding/Costs  
**Staff**  
Eligibility

Qualified Staff for the Program

To select qualified staff members for this program perform a search, select the appropriate staff member(s) from the search results grid, and then click the 'Add' button.

Selected: 0 Total: 4

<input type="checkbox"/>	Name	Assigned schools	Staff ID	Credential expiry date
<input type="checkbox"/>	Zeland, Zela		ZelaZ	01/01/0001
<input type="checkbox"/>	Bryant, James		1232	01/01/0001
<input type="checkbox"/>	Baker, Sher		0002	01/01/0001
<input type="checkbox"/>	Kim, Q		8003	01/01/0001

Add Remove

Staff Search

Basic Detail

Search by:

Credential Area	contains	
Credential Type	contains	
Last Name	contains	
Date Earned	contains	
Expiry Date	contains	

Display All Records Search

- 2 On the Staff page, use the Basic or Detail Staff search to find staff members.
- 3 From the search results, select a staff member.
- 4 Click Add.

The staff member is added to the Qualified Staff for the Program grid.

## Step 6: Define Eligibility Rules

Program eligibility rules define the criteria students must meet to be offered a position in the program. For example, students may only be able to take an advanced math program if their GPA is higher than 3.5.

### Note

Students are not automatically entered into programs based on eligibility criteria. They must apply to and be offered a position in the program. For more information, see "Applying to Programs" on page 117.

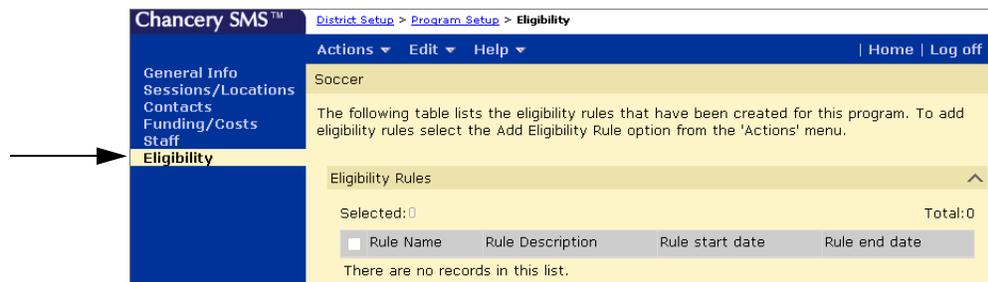
The following procedure provides an overview of the process for creating eligibility rules. For detailed information about using the eligibility control, including information about eligibility functions and parameters, see the Chancery SMS Understanding Eligibility Rules Technical Bulletin.

**Note**

You can use eligibility rules for programs in both the active and planning calendars. However, some eligibility functions and parameters may produce different results when used in the planning calendar. For example, since grades are not entered in the planning calendar, grading functions evaluate based on the active calendar. For more information, see the Chancery SMS Understanding Eligibility Rules Technical Bulletin.

**To DEFINE ELIGIBILITY RULES:**

- 1 In the control bar, click Eligibility.



- 2 On the Eligibility page, from the Actions menu, click Add Eligibility Rule.

The Define Eligibility Rule page opens.

Search By set.  
Depending on your selection from the first dropdown, additional Search By sets or Where Clauses may appear below the first Search By set.

- 3 On the Define Eligibility Rule page, enter the following information, as required:

Field	Description
Rule Name	Enter the name of the eligibility rule.
Rule start date	Enter the start date for the rule.  On the Manage Applicants page, rules are only available for sessions if their end date is greater than the session start date. If you do not enter start and end dates, the rule is available indefinitely.  <b>Note</b> Start and end dates for individual eligibility rules are not automatically applied to students. You must specify when each eligibility rule should be applied and to what subset of the student population.

Field	Description
Rule end date	Enter the end date for the rule. On the Manage Applicants page, rules are only available for sessions if their end date is greater than the session start date. If you do not enter start and end dates, the rule is available indefinitely.
Rule Description	Enter any additional information about the rule.
Category	Select a category of student information. For example, demographics, attendance, and so on.

4 Do any of the following to construct criteria statements for the eligibility rule:

To	Do this
Add a criteria statement to the eligibility rule	<ol style="list-style-type: none"> <li>Under Search By, from the first dropdown, select a field or function (e.g, gender, GPA, and so on).</li> <li>From the second dropdown, select the appropriate operator (e.g, equals, is equal to or greater than).</li> <li>In the third field, enter or select a value (e.g, Male, 3.5, and so on).</li> <li>If additional Search By sets appear, repeat Steps 1-3 for all sets.</li> <li>Click Add Criteria.</li> </ol> <p><b>Important</b> Searches are case sensitive. For example, if a user creates a rule: "Surname - Starts With - r" (lower case), students will not be eligible if their last name starts with R (upper case).</p>
Delete a criteria statement from the eligibility rule	<ol style="list-style-type: none"> <li>Under Eligibility Criteria, click the criteria statement.</li> <li>Click Remove.</li> </ol>
Add a logical operator to define the relationships between statements	<ol style="list-style-type: none"> <li>Under Eligibility Criteria, click AND or OR.</li> <li>Add a criteria eligibility statement to the logical operator.</li> </ol> <p><b>Note</b> Eligibility rules using multiple criteria must conform to the "Rule of Two". Each operator must have a pair of items nested underneath. Item pairs can be either two criteria OR one criteria and an operator (AND / OR).</p>
Move a statement to another location in the eligibility rule	<ul style="list-style-type: none"> <li>Drag the statement to the new location.</li> </ul>
Validate the rule	<ul style="list-style-type: none"> <li>Click Validate.</li> </ul>
Save the rule and continue working with it	<ul style="list-style-type: none"> <li>Click Apply.</li> </ul> <p>The new eligibility rule appears in text format below the eligibility Criteria list box.</p>

5 To save and continue entering eligibility rules, click Apply.

OR

To save and return to the Eligibility page, click OK.

## Examples of Eligibility Rules by Program Category

The following examples illustrate some typical eligibility rules for each program category. For information about setting up eligibility rules, see “Step 6: Define Eligibility Rules” on page 43.

### Note

You can use eligibility rules for programs in both the active and planning calendars. However, some eligibility functions and parameters may produce different results when used in the planning calendar. For example, since grades are not entered in the planning calendar, grading functions evaluate based on the active calendar. For more information, see the Chancery SMS Understanding Eligibility Rules Technical Bulletin.

### Academic Enhancement

Academic Enhancement programs are usually calculated based on information such as grades, attendance, test scores and/or aptitude tests.

This example is an eligibility rule for students with a grade point average of 3.5 or higher who have a perfect attendance record:

Eligibility Criteria

-Criteria  
-AND  
Current year GPA is greater than or equal to 3.5  
Days absent unexcused equals 0

AND
OR

Validate
Remove

((Current year GPA is greater than or equal to 3.5 where current year GPA definition equals Unweighted simple GPA Hist )AND(Days absent unexcused equals 0 where start date equals Start of District Calendar (active) and end date equals End of District Calendar (active) ))

### After School Academic

After School Academic programs are calculated in a similar manner to Academic Enhancement programs. However, After School Academic programs are generally aimed at students who require assistance with the regular curriculum rather than students who require enrichment or additional academic challenges.

This example is an eligibility rule for a tutoring program for grade 8 students with a current year grade point average of 2.5 or less:

Eligibility Criteria

-Criteria

- AND
  - Grade level equals 8
  - Current year GPA is less than or equal to 2.5

AND
OR

Validate
Remove

((Grade level equals 8 where effective date equals Start of Working Calendar )AND(Current year GPA is less than or equal to 2.5 where current year GPA definition equals Unweighted simple GPA Hist ))

### After School Athletics

After School Athletics programs generally require students to pass health examinations and maintain a certain grade point average. Students who fail to maintain their grade point average may be eligible to practice but not play, or they may need to meet study requirements.

This example applies to eligibility rules for a sports program, where students must be exam compliant for a blood/glucose test and a body fat percentage test, as well as maintain a 3.0 grade point average.

Eligibility Criteria

-Criteria

- AND
  - AND
    - Student is exam compliant equals True
    - Student is exam compliant equals True
  - Cumulative GPA is greater than or equal to 3.0

AND
OR

Validate
Remove

(((Student is exam compliant equals True where start date equals Start of District Calendar (active) and end date equals End of District Calendar (active) and health examination type equals Blood/glucose test )AND(Student is exam compliant equals True where start date equals Start of District Calendar (active) and end date equals End of District Calendar (active) and health examination type equals Body fat percent ))AND(Cumulative GPA is greater than or equal to 3.0 where cumulative GPA definition equals Cumulative GPA ))

## Early Childhood Education

Early Childhood Education programs include federal programs such as HeadStart and Title 1, which have specific eligibility requirements set by the federal government.

This example is an eligibility rule for an Early Childhood Education program where students must be between the ages of 3 and 5 and live in a Title 1 area.

Eligibility Criteria

-Criteria

- AND
- Lives in title 1 area equals True
- OR
- Age is greater than or equal to 3
- Age is less than or equal to 5

AND
OR

Validate
Remove

((Lives in title 1 area equals True)AND((Age is greater than or equal to 3 where effective date equals Start of Working Calendar )OR(Age is less than or equal to 5 where effective date equals Start of Working Calendar )))

## English Language Learners

English Language Learners programs are available to students who demonstrate low proficiency in English on the language survey test administered by the school, or whose home language is not English.

This example is an eligibility rule for an ELL program where students must speak a language other than English at home.

Eligibility Criteria

-Criteria

- Language other than english spoken at home equals Yes

AND
OR

Validate
Remove

(Language other than english spoken at home equals Yes)

## Free & Reduced Meals

Free & Reduced Meals program guidelines are set annually by the USDA. Free & Reduced Meals programs are offered to students under several different circumstances. Students who are eligible for free meals must meet different eligibility criteria than those who are only eligible for reduced meals.

This example applies to a situation where students must live in a low income area and receive some form of social services, such as food stamps, to qualify for free meals.

Eligibility Criteria

-Criteria  
-AND  
Lives in low income area equals True  
Food stamp case number is not empty

AND

OR

Validate Remove

((Lives in low income area equals True)AND(Food stamp case number is not empty ))

## Gifted and Talented

Gifted and talented programs are often associated with magnet schools or magnet programs. Criteria often includes high test scores or demonstrated aptitude in a particular subject(s). In some cases, students must be enrolled in the gifted and talented program to enroll in specific classes associated with the program.

This example applies to a Gifted and Talented program, where students must have an overall GPA of 4.0 for the year to date.

Eligibility Criteria

-Criteria  
Current year GPA is greater than or equal to 4.0

AND

OR

Validate Remove

(Current year GPA is greater than or equal to 4.0 where current year GPA definition equals Unweighted simple GPA Hist )

## Homeless

Homeless students or family members must prove homelessness. Usually a recruiter’s report or similar documentation is required.

### Note

Homeless students usually qualify automatically for transportation programs.

This example is an eligibility rule for a Homeless program for students who lack a nighttime residence.

Eligibility Criteria

-Criteria  
Lacks nighttime residence equals True

AND

OR

Validate Remove

(Lacks nighttime residence equals True)

## Migrant Status

Migrant students or families must prove migrancy. The recruiter will usually verify arrival dates and movement between states, cities and districts. Migrant students may also be identified as Migrants on the Student Demographics page.

This example is an eligibility rule for a Migrant Status program for students who have documented Migrant status.

Eligibility Criteria

-Criteria  
Migrant status description equals Currently a migratory child

AND

OR

Validate Remove

(Migrant status description equals Currently a migratory child)

## Out of District Placement

Out of District Placement programs usually require a recommendation from a student's IEP team or coordinator, or proof that a service for which they are legally entitled is not available in their home district.

This example is an eligibility rule for an Out of District Placement program for students who must be receiving special services.

The screenshot shows a software interface titled "Eligibility Criteria". It features a large text area containing the text "-Criteria" followed by "Receives specialized services is not empty". To the left of this area are two buttons labeled "AND" and "OR". Below the text area are two buttons labeled "Validate" and "Remove". At the bottom of the interface, a summary line reads "(Receives specialized services is not empty)".

## Special Services

Special Services programs usually require a recommendation from a teacher, administrator, or counselor to initiate the IEP process.

This example is an eligibility rule for pregnant students who are receiving specialized services.

The screenshot shows a software interface titled "Eligibility Criteria". The text area contains "-Criteria" followed by "-AND", "Student is pregnant equals True", and "Receives specialized services is not empty". To the left are "AND" and "OR" buttons. Below the text area are "Validate" and "Remove" buttons. The summary line at the bottom reads "((Student is pregnant equals True)AND(Receives specialized services is not empty ))".

# Setting up Transportation Programs

The district's transportation office defines transportation services and assigns them to selected schools and programs.

You must specify whether the district provides transportation to students attending specific programs or schools, as well as define the criteria required for the student to receive transportation. You can specify transportation available to programs (see “Assigning Transportation Settings to District Program” on page 53) and to schools (see “Assigning Transportation Settings to Schools” on page 54).

Before determining student eligibility for transportation programs, make sure the “Distance from school” and “Home address is in school's area” are correct on the Student Demographics page. For more information, see “Entering Transportation Data” on page 146.

## Assigning Transportation Settings to District Program

- 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 Transportation Program Settings.

The Transportation Program Settings page opens.

District Setup > Transportation Program Settings

Actions Edit Help Home Log off

Transportation Properties

Enables transportation

Minimum miles:

Maximum miles:

Check if students are in school area

Program Search

Basic Detail

Search by:

Program Category equals

Program equals

Program Group equals

Program Start Date equals  mm/dd/yyyy

Program End Date equals  mm/dd/yyyy

[Display All Records](#)

Program Search Results

- 4 On the Transportation Program Settings page, enter the following information, as required:

Field	Description
Enables Transportation	Select this option if the selected programs allow students to be transported to its location.
Minimum miles	If the Enables Transportation option is selected, specify the minimum distance required between the student's home address and the school for the student to receive transportation.
Maximum miles	If the Enables Transportation option is selected, specify the maximum distance required between the student's home address and the school for the student to receive transportation.
Check if student is in school area	Available when the Enables Transportation option is selected. Select this option if a student's home address must fall within the school's attendance area or physical borders to receive transportation.  <b>Note</b> The student is considered to be in the school area if the "Home address is in school area" option is selected on the Student Demographics page.

- 5 Use the Program Search panel to search for programs.
- 6 From the search results, select the programs these transportation settings apply to. Click Apply.

**Note**

If you select the same programs and change the Transportation Properties, the new properties replace the old properties, even if transportation eligibility has already been calculated in Program Management.

## Assigning Transportation Settings to Schools

- 1 Log on as a district administrator.
- 2 On the District Setup page, click Transportation School Settings.

The Transportation School Settings page opens.

- 3 On the Transportation School Settings page, enter the following information, as required:

Field	Description
Enables Transportation	Select this option to specify that the selected schools allow students to be transported to their locations.
Minimum miles	If the Enables Transportation option is selected, specify the minimum distance required between the student's home address and the school for the student to receive transportation.
Maximum miles	If the Enables Transportation option is selected, specify the maximum distance required between the student's home address and the school for the student to receive transportation.
Check if student is in school area	<p>If transportation is enabled, select this option to specify that a student's home address must fall within the school's attendance area or physical borders.</p> <p>Active only if Enables Transportation is selected for the school or program.</p> <p><b>Note</b> The student is considered to be in the school area if the "Home address is in school area" option is selected on the Edit Status Code page for the student's school enrollment. For more information, see "Entering Transportation Data" on page 146.</p>

- 4 Search for schools using the Basic or Detail school search.

- 5 To assign the transportation settings, select one or more schools from the search results and click Apply.

**Note**

If you select the same schools and change the Transportation Properties, the new properties will replace the old properties, even if transportation eligibility has already been calculated in Program Management.

**Chancery SMS does not check whether a student's home address meets any zone, attendance area, or boundary requirement when Transportation properties are added or changed.**

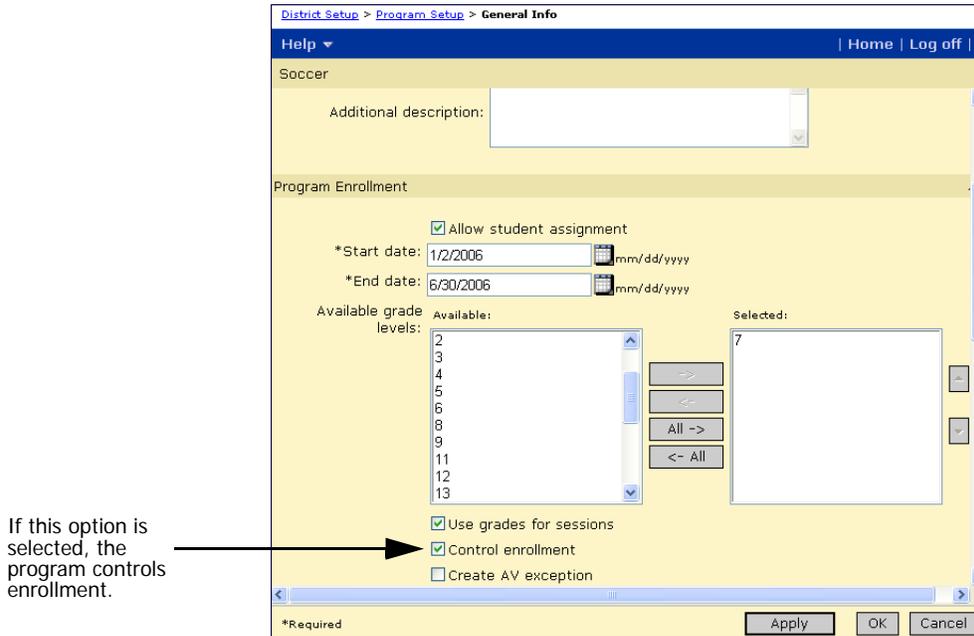
## Controlling Enrollment in Schools

You can use programs to control enrollment at schools. If any program assigned to a school has the Control Enrollment option set to “Yes”, then controlled enrollment applies to the entire school and students are not able to enroll in the school unless they are offered a position in at least one program that controls enrollment at that school.

**Note**

Once students are enrolled in a school that controls enrollment, they can be assigned to other programs offered at that school including other programs that control enrollment. For example, after a student is offered a position in the gifted and talented program that controls enrollment at a school, the student can be enrolled in the school and will be automatically enrolled in the gifted and talented program. The student could then be assigned to an after-school athletics program, which also controls enrollment at the school, or to a free & reduced lunch program, which does not control enrollment.

The following figure shows the Control Enrollment option on the General Info page for a program:



If you want to control enrollment to a specific program at a school, but allow open enrollment to students not applying to that program, you must create two controlled enrollment programs: one for the program that controls enrollment and another for other students in the school. For example, if your school offers a Gifted and Talented program that is limited to 20 students and wants to offer open enrollment to all other students. You would create a Gifted and Talented program that specifies the eligibility criteria for the program and a capacity of 20. In addition, you would need to create another controlled enrollment program for open enrollment that specifies no eligibility criteria and an unlimited capacity. Before students could enroll in the school, they would have to apply to and be offered a position in at least one of the two programs.

To attend a school that controls enrollment, students must first apply to a program at the school that controls enrollment, e.g., the gifted and talented program. When the student is offered a position in the program, they can enroll in the school. When you enroll a student in a school that has controlled

enrollment programs, the Add Status Code page includes additional fields that require you to specify the controlled enrollment program the student has been offered.

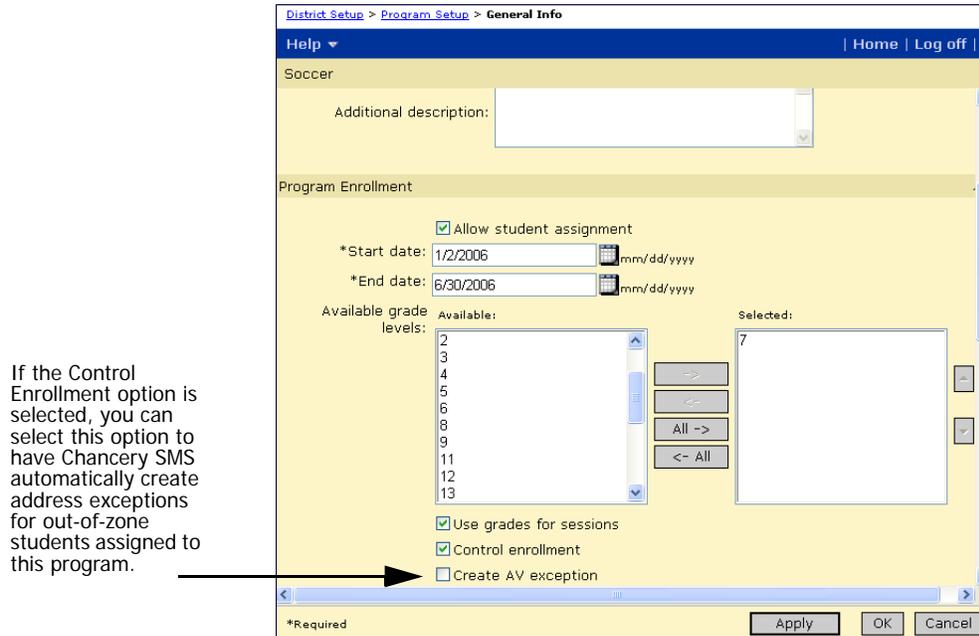
These field are only available when, from the School of Enrollment dropdown, you select a school that has at least one controlled enrollment program.

For information about creating programs, see “Creating Programs” on page 32. For information about enrolling in schools with controlled enrollment, see “Enrolling Students in Schools With Controlled Enrollment” on page 128.

## Controlled Enrollment and Address Exceptions

If your district uses address validation and a school controls enrollment, you can have Chancery SMS automatically create a preapproved address validation exception for out-of-zone students who are accepted into the program and enrolled in the school.

The following figure shows the Create AV Exception option on the General Info page for a program:



## Working with Program Information

After you create programs at the district, you can edit or delete program information. The following table describes the information you can edit:

Program Information	Description	To edit this section, see
General Information	You can edit general information such as the program description, start and end dates, and enrollment information.	“Editing General Information” on page 60.
Sessions and Locations	You can add new sessions, assign programs to schools or off-campus facilities, remove existing schools or off-campus facilities, and edit or delete existing sessions.	“Editing or Deleting Sessions and Locations” on page 62.
Contacts	You can edit or delete district or state contacts for the program.	“Editing or Deleting District or State Contacts” on page 64.
Funding/Costs	You can edit or delete information about funding sources and costs for the program.	“Editing or Deleting Funding and Student Costs Information” on page 66.
Staff	You can remove staff assigned to the program.	“Removing Staff from a Program” on page 67.
Eligibility	You may edit or delete existing eligibility rules for the program.	“Editing or Deleting Eligibility Rules” on page 68.

**Note**

You can work with programs in both the active and planning calendars. However, program setup is date-based rather than calendar-specific and program dates can span multiple calendars. Changes entered in one calendar apply to the overall program setup and can affect the program in all calendars included within the program start and end dates. For example, if, while in the planning calendar, you change the staff assigned to a program. The staff assignment applies to the overall program setup. If the program dates include the active calendar, the staff assignment changes also affect the program in the active calendar. If you plan to change a program in the planning calendar and do not want the changes to affect the program in the active calendar, end the program as of the end of the active calendar. Then copy the program setup to the planning calendar. For more information, see “Copying Program Setup” on page 71.

## Editing General Information

You can change general information for programs in both the active and planning calendars. However, since programs are date-based rather than calendar-specific, changes are made to the overall program setup and affect the program for all calendars included within the program start and end dates.

If you want to change the program in one calendar only, create a new program to start in that calendar. For example, if you want to change the program setup for the next school year, end the program at the end of the active calendar and create a new program for the planning calendar.

**TO EDIT GENERAL PROGRAM INFORMATION:**

- 1 Log on as a district administrator.
- 2 In the control bar, under Admin, click District Setup.
- 3 On the District Setup page, under Program Management, click Program Setup.
- 4 Search for programs using the Basic or Detail search and select the program to edit from the search results.
- 5 On the Program Setup page, from the Actions menu, click Edit Program Setup.
- 6 On the General Information page, edit the following information, as required:

Field	Description
Program category	Select a program category.
Program	Select a program name.
Program group	Select a program group from the dropdown.
Program short code	The Program short code value is populated from the Program setup list for the selected program.

Field	Description
Program state short code	The Program state short code value is populated from the Program setup list for the selected program.
Additional description	Enter any additional information about the program, up to 1000 characters.
Allow student assignment	Select this option to display the program on the Manage Programs page and allow students to be assigned to the program. If this option is not selected, the program will not display on the Manage Programs page. <b>Note</b> If you deselect this option after students are assigned to the program, the program will no longer be available on the Manage Programs page, but the students will still be assigned to the program.
Start date	Specify the program start date. <b>Note</b> If you change the program dates after students are assigned to program sessions and the new dates are more restrictive, the program session dates for the students are adjusted.
End date	Specify the program end date. <b>Note</b> If you change the program dates after students are assigned to program sessions and the new dates are more restrictive, the program session dates for the students are adjusted.
Available Grade Levels	Select one or more grade levels for which the program provides services. <b>Note</b> These values are used for reference only. To restrict a program to a specific grade level, you must create an eligibility rule. For more information, see “Editing or Deleting Eligibility Rules” on page 68.
Use grades for sessions	Select this option to make only the grade levels specified in the previous field available on the Session Details page.
Control enrollment	Select this option if the program is used to control enrollment at schools. For more information about controlled enrollment, see “Controlling Enrollment in Schools” on page 56. <b>Note</b> If you change this setting after students are enrolled in the school, the change only affects new enrollments. Students already enrolled in the school are not affected.
Create AV exception	If the Control Enrollment option is selected and you want Chancery SMS to automatically create preapproved address validation exceptions for students offered positions in schools that are not their zoned schools, select this option. <b>Note</b> If you change this setting after students are assigned to the program, the change only affects new applications. Address validations exceptions would not be created for any students already assigned to the program.
Instructional minutes by class/student	For reporting purposes, enter the number of minutes students in the program class are expected to receive each day.

Field	Description
Instructional minutes by school year/student	For reporting purposes, enter the number of minutes students in this program are expected to receive during the school year.
Required Documentation	Select any documents students must submit before they can be offered a position in the program. <b>Note</b> These values are for reference only and do not affect student eligibility for the program. To base program eligibility on documents received, create an eligibility rule. For more information, see “Step 6: Define Eligibility Rules” on page 43.
Interaction with Other Programs	Select any programs that interact with this program. For example, if meals will be served during a program. <b>Note</b> These values are for reference only. Students must apply and be offered and assigned to each program individually.

7 Click OK.

## Editing or Deleting Sessions and Locations

If students have not been assigned to sessions, you can modify the session details and delete the session, as required. If the students are assigned to a session, you must remove participating students from the session, before you can delete it. For more information, see “Removing Participants from Programs” on page 173.

### Note

Program sessions are calendar-specific. When you create a planning calendar, program sessions are copied to the planning calendar the first time Next-Year Preparation is run. Sessions are not updated when subsequent nightly processes are run for Next-Year Preparation. Any changes made in either the active or planning calendar do not affect program sessions in the other calendar.

### TO EDIT OR DELETE SESSIONS AND LOCATIONS:

- 1 Log on as a district administrator.
- 2 In the control bar, under Admin, click District Setup.
- 3 On the District Setup page, under Program Management, click Program Setup.
- 4 Search for programs using the Basic or Detail search and, from the search results, select the program.
- 5 On the Program Setup page, from the Actions menu, click Edit Program Setup.
- 6 In the control bar, click Sessions/Locations.

- 7 On the Sessions/Locations page, select a program session and do one of the following:

To	Do this
Edit a program session	<ul style="list-style-type: none"> <li>From the Actions menu, click Edit Program Session.</li> </ul>
Delete a program session	<p><b>Note</b> Before you delete a program session, remove any participating students from the session.</p> <ol style="list-style-type: none"> <li>From the Actions menu, click Delete Program Session.</li> <li>To confirm, click OK.</li> <li>Skip the remaining steps.</li> </ol>

- 8 On the Session Details page, edit the following information, as required:

Field	Description
Program session	Enter the program session name.
Start date	<p>Enter the date the session starts using the format mm/dd/yyyy.</p> <p>The session start date must be on or after the program enrollment start date set on the General Information page and both the start and end dates must be within the same calendar. Program sessions cannot cross calendars.</p> <p>Schools assigned this program session can change the session start date for their school.</p> <p>For more information, see “Entering and Editing School Setup Information” on page 86.</p> <p><b>Note</b> If necessary, the school session start date is modified to fit within the new district session dates, and, if students have already been assigned to the session, their start date is also adjusted to fit with the new session dates.</p>
End date	<p>Enter the date the session ends using the format mm/dd/yyyy.</p> <p>The session end date must be on or before the program enrollment end date set on the General Information page and both the start and end dates must be within the same calendar. Program sessions cannot cross calendars.</p> <p>Schools assigned this program session can change the session end date for their school.</p> <p>For more information, see “Entering and Editing School Setup Information” on page 86.</p> <p><b>Note</b> If necessary, the school session end date is modified to fit within the new district session dates, and, if students have already been assigned to the session, their end date is also adjusted to fit with the new session dates.</p>
Planning Calendar Option	<p>Select how this program session will be handled in planning calendars.</p> <p>For more information, see “Setting Planning Calendar Options” on page 17.</p>

Field	Description
Planning Calendar “Requested School” Controlled by Program Management	To prevent users from changing the student’s requested school on the Add/Edit Status Code page, for the school enrollment associated with this program session, select this option.  If this program allows general entry into the school, i.e., it does not have eligibility criteria or capacity limits, do not select this option.
Available Grade Levels	Specify one or more grade levels for which the program session provides services.  If the “Use the selected grade for sessions” option is selected on the General Information page, the grades available in this list are restricted to the grade levels selected on the General Information page. If the “Use the selected grade for sessions” option is not selected on the General Information page, all district grade levels are available in this list.  <b>Note</b> These values are for reference only. If you want to restrict the program session to students in specific grades, you must use eligibility rules. For information, see “Step 6: Define Eligibility Rules” on page 43.

- 9 Under Assign to Schools, to add schools to the session, in the Available list, select the schools and click Add.

OR

To remove schools from the session, in the Selected list, select the schools and click Remove.

**Note**

You must remove participants and applicants from the program session before you can remove the program from the school.

- 10 Under Assign to Off-Campus Facilities, to add off-campus facilities to the session, in the Available list, select the facilities and move them to the Selected list.

OR

To remove off-campus facilities, in the Selected list, select the facilities and move them to the Available list.

- 11 Click OK.

## Editing or Deleting District or State Contacts

You can change the district and state contacts for programs in both the active and planning calendars. However, since programs are date-based rather than calendar-specific, changes are made to the overall program setup and affect the program for all calendars included within the program start and end dates.

If you want to change the program in one calendar only, create a new program to start in that calendar. For example, if you want to change the program setup for the next school year, end the program at the end of the active calendar and create a new program for the planning calendar.

**TO EDIT OR DELETE DISTRICT OR STATE CONTACTS:**

- 1 Log on as a district administrator.
- 2 In the control bar, under Admin, click District Setup.
- 3 On the District Setup page, under Program Management, click Program Setup.
- 4 Search for programs using the Basic or Detail search and select the program to edit from the search results.
- 5 On the Program Setup page, from the Actions menu, click Edit Program Setup.
- 6 In the control bar, click Contacts.
- 7 Do any of the following:

To	Do this
Edit a district contact	<ol style="list-style-type: none"> <li>1 On the Contacts page, select a district contact.</li> <li>2 From the Actions menu, click Edit District Contact.</li> <li>3 Edit the contact details as required.</li> <li>4 To save your data and return to the Contacts page, click OK.</li> </ol> <p>OR</p> <p>To save your data and continue, click Apply.</p>
Delete a district contact	<ol style="list-style-type: none"> <li>1 On the Contacts page, select a district contact.</li> <li>2 From the Actions menu, click Delete District Contact.</li> <li>3 To confirm, click OK.</li> </ol>
Edit a state contact	<ol style="list-style-type: none"> <li>1 On the Contacts page, select a state contact.</li> <li>2 From the Actions menu, click Edit State Contacts.</li> <li>3 Edit the contact details as required.</li> <li>4 To save your data and return to the Contacts page, click OK.</li> </ol> <p>OR</p> <p>To save your data and continue, click Apply.</p>
Delete a state contact	<ol style="list-style-type: none"> <li>1 On the Contacts page, select a state contact.</li> <li>2 From the Actions menu, click Delete State Contacts.</li> <li>3 To confirm, click OK.</li> </ol>

- 8 To save your data and return to the Program Setup page, click OK.

OR

To save your data and continue, click Apply.

## Editing or Deleting Funding and Student Costs Information

You can change funding and student cost information for programs in both the active and planning calendars. However, since programs are date-based rather than calendar-specific, changes are made to the overall program setup and affect the program for all calendars included within the program start and end dates.

If you want to change the program in one calendar only, create a new program to start in that calendar. For example, if you want to change the program setup for the next school year, end the program at the end of the active calendar and create a new program for the planning calendar.

### TO EDIT OR DELETE FUNDING AND COST INFORMATION:

- 1 Log on as a district administrator.
- 2 In the control bar, under Admin, click District Setup.
- 3 On the District Setup page, under Program Management, click Program Setup.
- 4 Search for programs using the Basic or Detail search. Select the program to edit from the search results.
- 5 On the Program Setup page, from the Actions menu, click Edit Program Setup.
- 6 In the control bar, click Funding/Costs.
- 7 On the Funding/Costs page, select a program funding record.
- 8 Do one of the following:

To	Do this
Edit program funding information	<ol style="list-style-type: none"> <li>1 On the Funding/Costs page, under Program Student Costs, edit the program student costs information.</li> <li>2 From the Actions menu, click Edit Details.</li> </ol>
Delete program funding information	<ol style="list-style-type: none"> <li>1 From the Actions menu, click Delete Program Funding.</li> <li>2 To confirm, click OK.</li> <li>3 Skip the remaining steps.</li> </ol>

- 9 On the Edit Details - Program Funding page, edit the following information, as required:

Field	Description
Source	Select the funding source (e.g, Federal).
Name	Enter the name of the individual, entity, or agency providing the funding.

Field	Description
ID	Enter the identification number of the funding source.
Amount	Enter the amount of money being pulled from the grant or funding source.
Closure	Specify the date you expect the funding program will close.
Staff	Enter the number of instructors that can be funded through this source.
Additional details	Enter any additional information about this funding source.

- 10 To save your data and return to the Program Setup page, click OK.

OR

To save your data and continue, click Apply.

## Removing Staff from a Program

You can change staff assignments for programs in both the active and planning calendars. However, since programs are date-based rather than calendar-specific, changes are made to the overall program setup and affect the program for all calendars included within the program start and end dates.

If you want to change the program in one calendar only, create a new program to start in that calendar. For example, if you want to change the program setup for the next school year, end the program at the end of the active calendar and create a new program for the planning calendar.

### **TO REMOVE STAFF FROM A PROGRAM:**

- 1 Log on as a district administrator.
- 2 In the control bar, under Admin, click District Setup.
- 3 On the District Setup page, under Program Management, click Program Setup.
- 4 Search for programs using the Basic or Detail search. Select the program to edit from the search results.
- 5 On the Program Setup page, from the Actions menu, click Edit Program Setup.
- 6 In the control bar, click Staff.

- 7 On the Staff page, under Qualified Staff for the Program, select a staff member and click Remove.

**Note**

Removing a staff member from a program does not delete the staff record in Chancery SMS.

## Editing Staff Information

When you are working with staff assigned to programs, you can open the Staff Overview page and review or edit information about that staff member. For detailed information about using the Staff Overview page and editing staff information, see the Chancery SMS District Administration Guide.

You can change staff assignments for programs in both the active and planning calendars. However, since programs are date-based rather than calendar-specific, changes are made to the overall program setup and affect the program for all calendars included within the program start and end dates.

If you want to change the program in one calendar only, create a new program to start in that calendar. For example, if you want to change the program setup for the next school year, end the program at the end of the active calendar and create a new program for the planning calendar.

**TO OPEN THE STAFF OVERVIEW PAGE WHILE WORKING WITH PROGRAMS:**

- 1 Log on as a district administrator.
- 2 In the control bar, under Admin click District Setup.
- 3 On the District Setup page, under Program Management, click Program Setup.
- 4 Search for programs using the Basic or Detail search. Select the program to edit from the search results.
- 5 On the Program Setup page, from the Actions menu, click Edit Program Setup.
- 6 In the control bar, click Staff.
- 7 On the Staff page, in the “Qualified staff for this program” panel, in the Name column, click the staff member’s name.

## Editing or Deleting Eligibility Rules

Program eligibility rules define the criteria students must meet to be offered a position in the program. For example, students may only be able to take an advanced math program if their GPA is higher than 3.5.

**Note**

Students are not automatically entered into programs based on eligibility criteria. They must apply to and be offered a position in the program. For more information, see “Applying to Programs” on page 117.

The following procedure provides an overview of the process for modifying eligibility rules. For detailed information about using the eligibility control, including information about eligibility functions and parameters, see the Chancery SMS Understanding Eligibility Rules Technical Bulletin.

You can change the eligibility rules for programs in both the active and planning calendars. However, since programs are date-based rather than calendar-specific, changes are made to the overall program setup and affect the program for all calendars included within the program start and end dates.

If you want to change the program in one calendar only, create a new program to start in that calendar. For example, if you want to change the program setup for the next school year, end the program at the end of the active calendar and create a new program for the planning calendar.

**Note**

Some eligibility functions and parameters may produce different results when used in the planning calendar. For example, since grades are not entered in the planning calendar, grading functions evaluate based on the active calendar. For more information, see the Chancery SMS Understanding Eligibility Rules Technical Bulletin.

**Important**

After changing or removing eligibility rules, recalculate student eligibility for programs.

**TO EDIT OR DELETE ELIGIBILITY RULES:**

- 1 Log on as a district administrator.
- 2 In the control bar, under Admin, click District Setup.
- 3 On the District Setup page, under Program Management, click Program Setup.
- 4 Search for the program to edit using the Basic or Detail search.
- 5 Select the program to edit from the search results.
- 6 On the Program Setup page, from the Actions menu, click Edit Program Setup.
- 7 In the control bar, click Eligibility.
- 8 On the Eligibility page, select an eligibility rule.

9 Do one of the following:

To	Do this
Edit an eligibility rule	<ol style="list-style-type: none"> <li>1 From the Actions menu, click Edit Eligibility Rule.</li> <li>2 Follow the instructions below to enter information about the eligibility rule.</li> </ol>
Delete an eligibility rule	<ol style="list-style-type: none"> <li>1 From the Actions menu, click Delete Eligibility Rule.</li> <li>2 To confirm, click OK.</li> <li>3 Skip the remaining steps.</li> </ol> <p><b>Note</b> Only one eligibility rule may be deleted at a time.</p>

10 On the Define Eligibility Rule page, enter or edit the following information, as required:

Field	Description
Rule Name	Enter the name of the eligibility rule.
Rule start date	<p>Enter the start date for the rule.</p> <p>On the Manage Applicants page, rules are only available for sessions if their start date is greater than the session start date and their end date is less than the session end date. If you do not enter start and end dates, the rule is available indefinitely.</p> <p><b>Note</b> Start and end dates for individual eligibility rules are not automatically applied to students. You must specify when each eligibility rule should be applied and to what subset of the student population. After creating a planning calendar or copying programs to the planning calendar, adjust the eligibility rule dates.</p>
Rule end date	<p>Enter the end date for the rule.</p> <p>On the Manage Applicants page, rules are only available for sessions if their start date is greater than the session start date and their end date is less than the session end date. If you do not enter start and end dates, the rule is available indefinitely.</p> <p><b>Note</b> Start and end dates for individual eligibility rules are not automatically applied to students. You must specify when each eligibility rule should be applied and to what subset of the student population. After creating a planning calendar or copying programs to the planning calendar, adjust the eligibility rule dates.</p>
Rule Description	Enter any additional information about the rule.
Category	Select a category of student information. For example, demographics, attendance, and so on.

- 11 Do any of the following to construct criteria statements for the eligibility rule:

To	Do this
Add a criteria statement to the eligibility rule	<ol style="list-style-type: none"> <li>Under Search By, from the first dropdown, select a field or function (e.g, gender, GPA, and so on).</li> <li>From the second dropdown, select the appropriate operator (e.g, equals, is equal to or greater than).</li> <li>In the third field, enter or select a value (e.g, Male, 3.5, and so on).</li> <li>If additional Search By sets appear, repeat Steps 1-3 for all sets.</li> <li>Click Add Criteria.</li> </ol> <p><b>Important</b> Searches are case sensitive. For example, if a user creates a rule: "Surname - Starts With - r" (lower case), students will not be eligible if their last name starts with R (upper case).</p>
Delete a criteria statement from the eligibility rule	<ol style="list-style-type: none"> <li>Under Eligibility Criteria, click the criteria statement.</li> <li>Click Remove.</li> </ol>
Add a logical operator to define the relationships between statements	<ol style="list-style-type: none"> <li>Under Eligibility Criteria, click AND or OR.</li> <li>Add a criteria eligibility statement to the logical operator.</li> </ol> <p><b>Note</b> Eligibility rules using multiple criteria must conform to the "Rule of Two". Each operator must have a pair of items nested underneath. Item pairs can be either two criteria OR one criteria and an operator (AND / OR).</p>
Move a statement to another location in the eligibility rule	<ol style="list-style-type: none"> <li>Select the statement.</li> <li>Drag the statement to the new location.</li> </ol>
Validate the rule	<ul style="list-style-type: none"> <li>Click Validate.</li> </ul>
Save the rule and continue working with it	<ul style="list-style-type: none"> <li>Click Apply.</li> </ul> <p>The the new eligibility rule appears in text format below the eligibility Criteria list box.</p>

- 12 To save and continue entering eligibility rules, click Apply.

OR

To save and return to the Eligibility page, click OK.

## Copying Program Setup

You can copy the structure of an existing program to a new program setup. Copying program setup is useful when two or more programs have only minor differences. For example, you might set up an after-school athletics program for the volleyball team, and then copy the program setup to a

program for the soccer team. Then you only need to make minor changes to the setup for the new program. Once the copy is complete, the new program will appear in the program listing.

You can also copy a program setup from the active calendar to the planning calendar. For example, if you plan to change the program setup for future years, such as assigning different staff, without affecting the program in the current active calendar, end the program as of the end of the active calendar. Then, copy the program setup to the planning calendar and make changes to the setup for the new program.

**Note**

When copying to the planning calendar, eligibility rules are copied regardless of their start and end dates. After you copy program setup, adjust the dates for the eligibility rules.

When you copy programs, only the program setup is copied. If you want to copy applicants or participants from the original program to the new program, you can use Move/Copy Applicants (see “Moving or Copying Program Applicants” on page 142) and Move/Copy Participants (see “Moving and Copying Participants” on page 175).

**Note**

Before you can copy program setup to a new program, you must create a setup list item for the new program.

Programs must be unique in their program category/program name and dates. You cannot copy a program setup if another program setup has the same program category/program and is offered on the same dates. For example, if you wanted to copy the program setup for after-school athletics/volleyball program offered September 1, 2006 to December 30, 2006, you could copy the setup to an after-school athletics/Soccer program offered September 1, 2006 to December 30, 2006 (different program name) or you could copy it to an after-school athletics/Volleyball program offered January 1, 2007 to June 30, 2007 (different program dates). You could not copy the program setup to an after-school athletics/Volleyball program offered December 1, 2006 to June 30, 2007 (the program name is the same and the dates in December overlap).

For more information about how sessions are copied, see “Understanding How Program Sessions are Copied” on page 74.

**TO COPY A PROGRAM:**

- 1 Log on as a district administrator.
- 2 In the control bar, under Admin, click District Setup.
- 3 On the District Setup page, under Program Management, click Program Setup.
- 4 Search for the program to copy using the Basic or Detail program search.

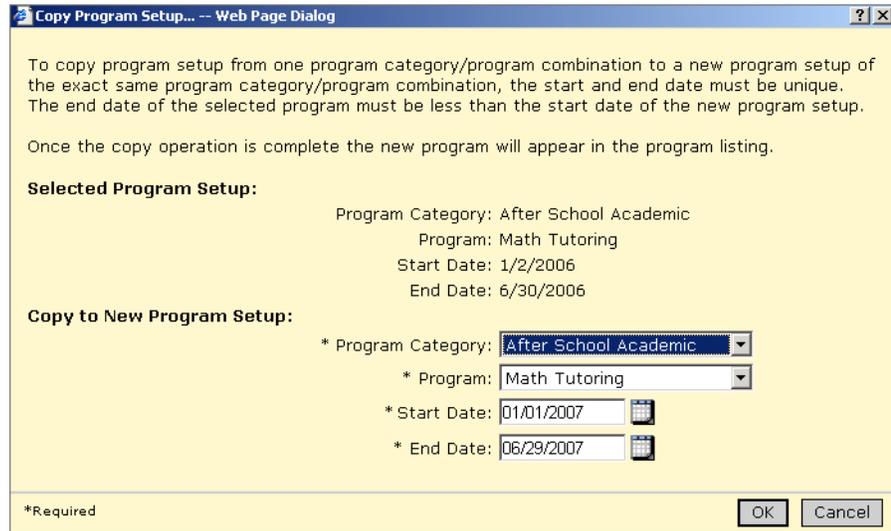
- 5 From the search results, select the program to copy.

**Note**

You can only copy one program at a time.

- 6 From the Actions menu, select Copy Program Setup.

The Copy Program Setup page opens.



- 7 On the Copy Program page, enter the following information:

Field	Description
Program Category	Select the program category for the new program.
Program	Select a program name. <b>Note</b> If you want to copy the program setup to a new program and the new program is not available from the Program dropdown, make sure you created a setup list item for that program. For more information about setup lists, see "Working with Program Management Setup Lists" on page 24.
Start Date	Enter the date the new program begins accepting applications (using the format mm/dd/yyyy).
End Date	Enter the date the new program stops accepting applications (using the format mm/dd/yyyy).

- 8 Click OK.

## Understanding How Program Sessions are Copied

When you copy a program setup within the active or planning calendars, or from the active calendar to the planning calendar, Chancery SMS also copies program sessions from the working calendar. Copied sessions have the same name as the original session and the session dates are adjusted to satisfy the following rules:

- Both the session start and end dates must fall within a single calendar. Sessions cannot cross calendars.
- Session start and end dates must fall within the program start and end dates.
- Sessions must be unique for each program setup/session name/date range. Only one session with the same name can be set up for any given date.

### Note

Program sessions are only copied from the working calendar. If you are using the planning calendar and copy a program from the active calendar to the planning calendar, the planning calendar sessions are copied. Since the program is currently not set up in the planning calendar, no sessions are copied.

If you do not want all the sessions in the new program, you can delete them after the copy is complete.

### Note

If a program setup is copied to a future date (past the planning calendar end date), the program setup is copied but sessions are not created.

## Deleting Program Setup

You can only delete a program setup if the program has never been assigned participants.

### Note

You cannot delete a program setup if students have ever been participants in the program. If you want to discontinue a program for future years, enter an end date for the program rather than deleting the program setup.

### TO DELETE A PROGRAM SETUP:

- 1 Log in as a district administrator.
- 2 In the control bar, under Admin, click District Setup.
- 3 On the District Setup page, under Program Management, click Program Setup.
- 4 Search for programs using the Basic or Detail program search.

- 5 From the search results, select the program you want to delete.

**Note**

You can only delete one program setup at a time.

- 6 From the Actions menu, click Delete Program Setup.
- 7 To confirm, click OK.

## Setting up Classes for Programs at the District

When you enroll a student in a program, the student is not automatically scheduled into specific classes or homerooms. If you want to create classes specifically for students who are enrolled in a program, you can use class and homeroom constraints to restrict the class to students in that program. When students are scheduled, they are assigned to classes based on the defined constraint criteria. In addition, if you want to track instructional minutes for program attendance summaries, you must create a program constraint and specify that you want to include the attendance minutes for classes with that constraint. For more information, see “Adding and Editing Student Program Details” on page 177.

Constraints can be created at the district or at the school. Constraints created at the district are available to all schools in the district. The school then has the option to apply the constraint to specific classes or homerooms or to modify a copy of the constraint. Schools cannot delete district-defined constraints. They can create their own constraints, as required.

Chancery SMS includes two types of constraints:

- Restriction constraints allow you to control the distribution of students in classes or homerooms according to a specific criteria. For example, you can create a math class for students enrolled in an academic enrichment program. Restriction constraints are available to schools using either elementary or secondary scheduling.
- Capacity Balancing constraints ensure that automated loading processes distribute students evenly among available classes based on certain criteria. For example, you may want to ensure that students in an ESL program are distributed among all Basic English classes rather than being grouped into one class. Capacity Balancing constraints are available only to schools using secondary scheduling.

The following examples illustrate how you might set up constraints for programs at the district. For detailed information about creating and editing constraints, see the Chancery SMS Scheduling Guide. For information about working with school program constraints, see “Setting Up Classes for Programs at the School” on page 90.

## Permissions to Work with District Constraints

To work with district constraints, you need the following permissions:

To	You need this permission	Set to
Add a constraint at the district	School Setup > Define Constraints - District	Edit or Delete
Delete a constraint at the district	School Setup > Define Constraints - District	Delete
To manually schedule a student who does not meet the constraint criteria into a class with a constraint	School Setup > Override Constraints	Yes

### Example - Setting Up an ESL Constraint at a School Using Secondary Scheduling

In this example, a district wants to balance students enrolled in their ESL program across all Basic English classes to avoid grouping the ESL students into a single class.

After the district creates this class constraint, when classes are scheduled and students are loaded into classes using Chancery SMS automated process, such as the student loader, Chancery SMS distributes students in the ESL program across all basic English classes. For detailed information about setting up constraints at a secondary school, see the Chancery SMS Scheduling Guide.

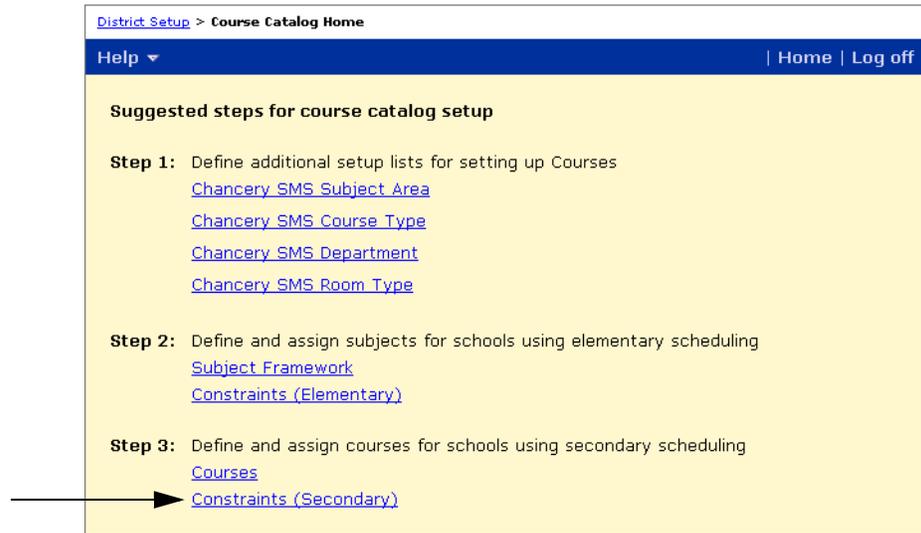
This example assumes that the following tasks have been completed:

- The course catalog includes a Basic English course and is published to secondary schools in the district.
- An ESL program is created and assigned to schools in the district.

#### **TO CREATE A CLASS CONSTRAINT FOR ESL ENGLISH:**

- 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 Course Catalog.

- 4 On the Course Catalog page, under Step 3, click Constraints (Secondary).



- 5 On the Constraints (Secondary) page, from the Actions menu, click Add Constraint.

The Add Constraint page opens.

- On the Add Constraints page, in the Define Constraint panel, enter the following information:

Field	Description
Name	Enter a name for the constraint, e.g., ELL English Program.
Program Constraint	Select this option to indicate that the constraint applies to a program.
Track Program Attendance for Classes With This Constraint	Select this option to include classes with this constraint in program attendance summaries. For more information, see “Adding and Editing Student Program Details” on page 177. <b>Note</b> To track instructional minutes for program attendance summaries, the class, or homeroom must be assigned a meeting pattern. For more information about assigning meeting patterns, see the Chancery SMS Scheduling Guide.
Constraint Type	To balance students across classes, select Capacity Balancing.

- 7 On the Select Student Criteria panel, enter the following information:

Field	Description
Program Category	Select the category the program belongs to, e.g., English Language Learners.
Program	Select the program, e.g., ELLSec. The options available are determined by the selected Program Category.
Available Sessions	The sessions available for the selected program appear in this list. Select a session, e.g., ELLSec001, and move it to the Selected Sessions list.

- 8 On the Select Courses panel, search for the courses you want to assign the constraint to.  
  
For this example, search for English courses.
- 9 In the Available Courses list, select Basic English and move it to the Selected Courses list.
- 10 From the Constraint Is dropdown, select default.

**Note**

At the district you can set the constraint as default or available. When set as default, the constraint is applied to classes when they are created. If classes are created before the constraint is created, the constraint is available to those classes, but is not applied automatically. Constraints are applied to classes at the school. For more information, see “Applying Constraints to Classes and Homerooms” on page 97.

- 11 Click OK.

## Example - Setting Up a Remedial Math Constraint at a School Using Elementary Scheduling

In this example, a district offers remedial math classes to elementary school students and wants to restrict this class to students enrolled in the elementary math tutoring program.

After this constraint is added, when classes are created and students are assigned to homerooms and classes using automated processes, Chancery SMS only schedules students into this math class if they are assigned to the Elementary Math Tutoring program. For detailed information about setting up constraints at an elementary school, see the Chancery SMS Scheduling Guide.

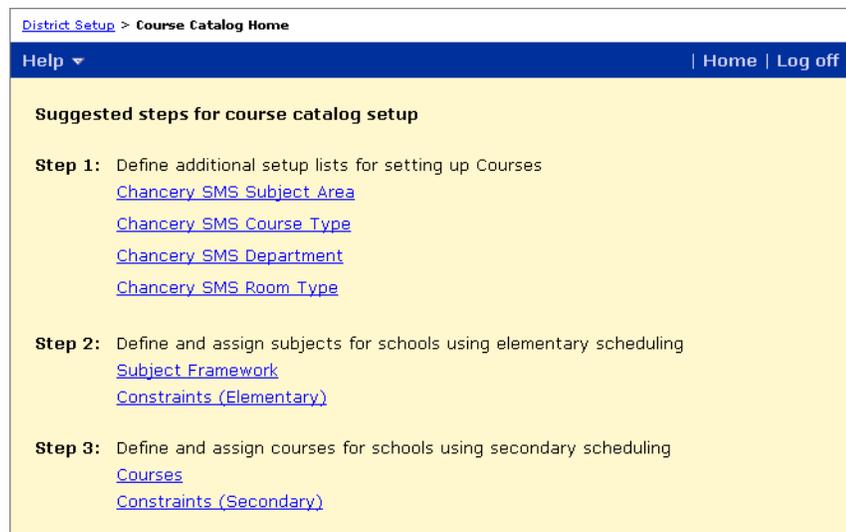
This example assumes that the following tasks have been completed:

- The course catalog includes a remedial math subject and is published to elementary schools in the district.
- An elementary math tutoring program is created and assigned to schools in the district.

**TO CREATE A CLASS CONSTRAINT FOR REMEDIAL MATH:**

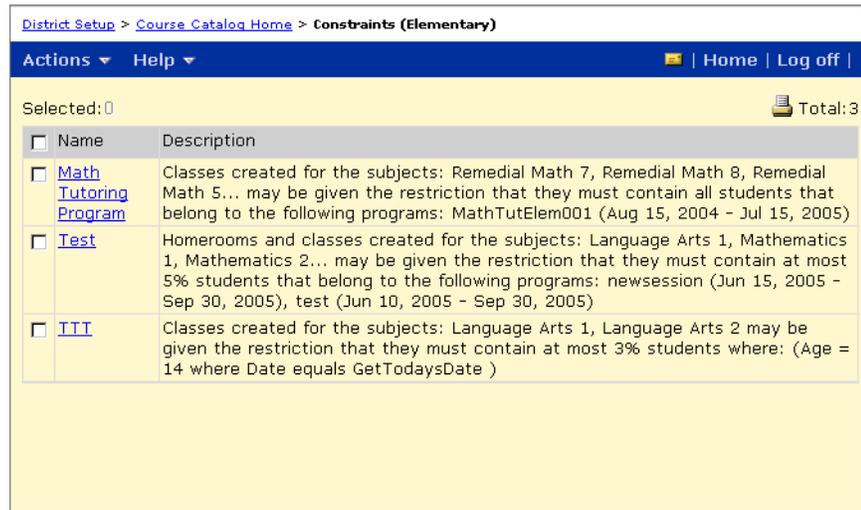
- 1 Log on as a district administrator.
- 2 In the control bar, under Admin, click District Setup.
- 3 On the District Setup page, under District, click Course Catalog.

The Course Catalog Home page opens.



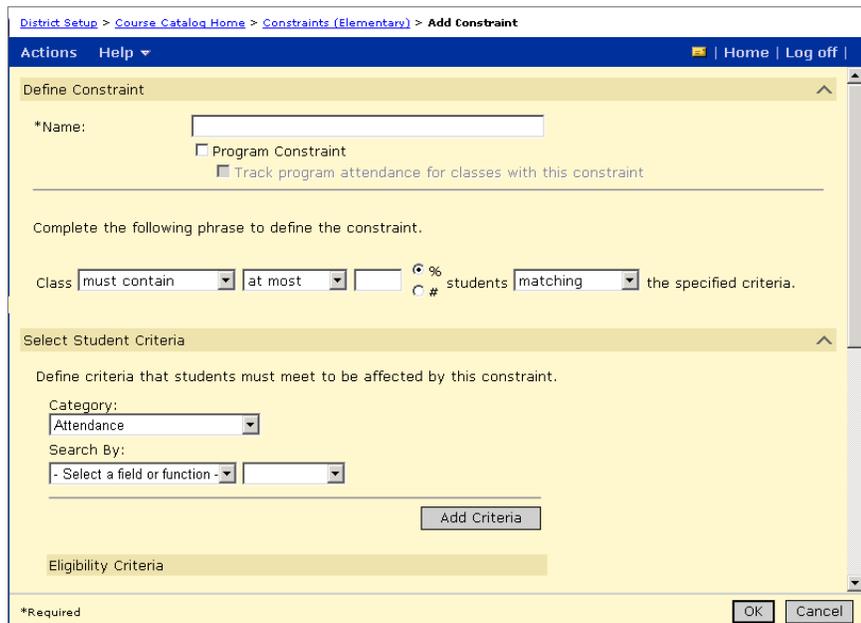
- 4 On the Course Catalog page, under Step 2, click Constraints (Elementary).

The Constraints (Elementary) page opens.



- 5 On the Constraints (Elementary) page, from the Actions menu, click Add Constraint.

The Add Constraint page opens.



- 6 On the Add Constraints page, in the Define Constraint panel, enter the following information:

Field	Description
Name	Enter a name for the constraint, e.g., Math Tutoring Program.
Program Constraint	Select this option to indicate that the constraint applies to a program.
Track Program Attendance for Classes With This Constraint	Select this option to include classes with this constraint in program attendance summaries. For more information, see “Adding and Editing Student Program Details” on page 177.  <b>Note</b> To track instructional minutes for program attendance summaries, the class, or homeroom must be assigned a meeting pattern. For more information about assigning meeting patterns, see the Chancery SMS Scheduling Guide.
Class	For this example, set as: must contain all students matching.  <b>Note</b> If you define the constraint as “must contain”, Chancery SMS will not schedule students into the class unless they are enrolled in the selected program. If you define it as “should contain”, Chancery SMS will schedule other students if there are not enough program students to fill the class.

- 7 In the Select Student Criteria panel, enter the following information:

Field	Description
Program Category	Select the category the program belongs to, e.g., Academic Enhancement.
Program	Select the program, e.g., MathTutElem.  The options available are determined by the selected Program Category.
Available Sessions	The sessions available for the selected program appear in this list.  Select a session, e.g., MathTutElem001, and move it to the Selected Sessions list.

- 8 In the Selected Subjects/Homerooms panel, enter the following information:

Field	Description
Constraint is for Subjects	Select this option to apply the constraint to students being manually added to classes for specific subjects.  In this example, since we do not want to allow students to be manually assigned to these classes unless they are enrolled in the program, select this option.
Available Subjects	The subjects assigned to elementary schools appear in the list.  Select the subjects, e.g., REMATH-05, REMATH-07, REMATH-08, and move them to the Selected Subjects list.
Constraint is for Homerooms	Select this option to apply the constraint to students automatically assigned to classes based on their homeroom.  In this example, since we want students enrolled in the program to be assigned to this class when they are scheduled based on their homeroom assignment, select this option.
Constraint Is	For this example, select Default.  <b>Note</b> At the district you can set the constraint as default or available. When set as default, the constraint is applied to classes and homerooms when they are created. If classes and homerooms are created before the constraint is created, the constraint is available to those classes and homerooms, but not applied automatically. Constraints are applied to classes and homerooms at the school. For more information, see "Applying Constraints to Classes and Homerooms" on page 97.

- 9 Click OK.



# SETTING UP SCHOOL PROGRAMS

After programs are set up and assigned to schools by the district, schools can further set up the programs assigned to their school. School administrators can assign specific staff to their programs, modify program session dates, modify and apply class and homeroom constraints.

Schools cannot create additional programs or delete programs that have been assigned to their school by the district.

## Permissions to Set Up Programs at the School

To	You need this permission	Set to
Add/edit school setup information	Program Category - <i>Category Name</i> > School Program Setup	Edit
View school setup information (no edit)	Program Category - <i>Category Name</i> > School Program Setup	View
Add/edit school contacts	Program Category - <i>Category Name</i> > School Program Setup	Edit
	District > Staff	Edit
Delete school contacts	Program Category - <i>Category Name</i> > School Program Setup	Delete
Edit program sessions	Program Category - <i>Category Name</i> > School Program Setup	Edit
Assign staff to programs	Program Category - <i>Category Name</i> > School Program Setup	Edit
Remove staff from program	Program Category - <i>Category Name</i> > School Program Setup	Delete
Add a constraint at a school	School Setup > Define Constraints - School	Edit or Delete
Delete a constraint at a school	School Setup > Define Constraints - School	Delete
Manually schedule a student who does not meet the constraint criteria into a class with a constraint	School Setup > Override Constraints	Yes

By default, district administrators can set up contacts and sessions for programs assigned to your school. District administrators can also edit, delete or copy programs and assign programs to schools.

School administrators can only set up programs or edit programs that have been assigned to their school by a district administrator.

For more information about working with permissions, see the Chancery SMS Permissions Guide or “Controlling User Access” in the Chancery SMS District Administration Guide.

## Entering and Editing School Setup Information

For each program assigned to the school, complete the following steps to set school-specific information for the program:

- “Setting Up School Information” on page 86
- “Assigning Staff to Programs” on page 87

### Setting Up School Information

At the school, school administrators can specify school contacts and set the dates and times for program sessions offered at their school.

**Note**

You can change the school contacts for programs in both the active and planning calendars. However, since programs are date-based rather than calendar-specific, changes are made to the overall program setup and affect the program for all calendars included within the program start and end dates.

**TO SET UP SCHOOL PROGRAM INFORMATION:**

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click School Setup.
- 3 On the School Setup page, under Program Management, click Program Setup.
- 4 On the Program Setup page, search for and select the program you want to set up.
- 5 From the Actions menu, click Setup School Info.
- 6 On the Setup School Info page, do one of the following:

To	Do this
Add a contact	<ul style="list-style-type: none"> <li>• From the Actions menu, click Add School Contact.</li> </ul>
Edit a contact	<ul style="list-style-type: none"> <li>• Under School Program Contacts, select the contact you want to edit.</li> </ul>
Delete a contact	<ol style="list-style-type: none"> <li>1 In the School Program Contacts section, select the contact you want to delete.</li> <li>2 From the Actions menu, click Delete School Program Contact.</li> <li>3 To confirm, click OK.</li> <li>4 Skip the remaining steps.</li> </ol>

- 7 In the school contact row, enter or edit the following information:

Field	Description
Name	Select a staff name.
Role	Select a role description for the staff member.
Phone number	This field displays the selected staff member's phone number, which is automatically populated from the selected staff member's staff personal record.
Email address	This field displays the selected staff member's email address, which is automatically populated from the selected staff member's staff personal record.

- 8 Under Program Sessions, select a session and enter or edit the following information:

Field	Description
Program Session	This field displays the name of the program session to which the school has access.
Start date	Enter the start date for the program session. Both the start and end dates must be within the same calendar.
End date	Enter the end date for the program session. Both the start and end dates must be within the same calendar.
Instructional minutes/class	For reporting purposes, enter the number of minutes students in the program class are expected to receive. <b>Note</b> This value is for reference only. For example, you can use this value in a custom report.

- 9 To save and continue working with the program, click Apply.

OR

To save and return to the Program Setup page, click OK.

## Assigning Staff to Programs

When the district sets up programs, it specifies staff who are available and qualified to be assigned to the program. At the school, you must assign a specific staff member to the program session offered at your school. You can assign a staff member from your school or a staff member the district specified as qualified to teach the program. You can search for qualified teachers and/or teachers at your school. For more information, see “Searching for Staff” on page 89.

**Note**

You can change staff assignments for programs in both the active and planning calendars. However, since programs are date-based rather than calendar-specific, changes are made to the overall program setup and affect the program for all calendars included within the program start and end dates.

**TO ASSIGN STAFF TO PROGRAMS:**

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click School Setup.
- 3 On the School Setup page, under Program Management, click Program Setup.
- 4 On the Program Setup page, search for and select a program.
- 5 From the Actions menu, click Setup School Info.
- 6 On the School Setup Info page, select a program session.
- 7 From the Actions menu, click Assign Staff.
- 8 On the Assign Staff page, search for staff using the Basic or Detail search. Select a staff member from the search results. For more information, see “Searching for Staff” on page 89.
- 9 To assign the staff member to the program, click Add.

Search for and select available staff. Then click Add to assign them to the program session.

School Setup > Program Setup > Setup School Info > Assign Staff

Actions Help | Home | Log off |

HH001

Assign Staff to the Program

To assign qualified staff members for this program perform a search, select the appropriate staff member(s) from the search results grid, and then click the 'Add' button.

Selected: 0 Total: 0

<input type="checkbox"/>	Name	Assigned schools	Staff ID	Credential expiry date	Assignment status
There are no records in this list.					

Add Remove

Staff Search

Basic Detail

Search by:

School Staff	equals	
Credential Area	equals	
Credential Type	equals	
Last Name	starts with	
District Qualified Staff	equals	

Display All Records Search

Search Results

List: - Select a search criteria -

Selected: 1 Total: 3

<input type="checkbox"/>	Name	School staff	Assigned schools	Staff ID	Credential expiry date
<input checked="" type="checkbox"/>	Abel, Amy	Yes	Chancery High	345345	04/02/2070

\*Required OK

## Searching for Staff

When you assign staff to program sessions offered at your school, you may want to assign a staff member from your school, a district-approved instructor for the program, or a staff member at your school who is also approved as an instructor by the district. You can use the Staff Search feature to help you identify an appropriate staff member to assign to your program sessions.

### **TO IDENTIFY STAFF AT YOUR SCHOOL WHO ARE DISTRICT-APPROVED FOR THE PROGRAM:**

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click School Setup.
- 3 On the School Setup page, under Program Management, click Program Setup.
- 4 On the Program Setup page, search for and select a program.
- 5 From the Actions menu, click Setup School Info.
- 6 On the School Setup Info page, select a program session.
- 7 From the Actions menu, click Assign Staff.
- 8 In the Staff Search panel, set the following search criteria:
  - School Staff equals Yes
  - District Qualified Staff equals Yes
- 9 Click Search.

The search results include only those staff members who are both designated as qualified for the program by the district and assigned to your school.

## Removing Staff from Programs

### **Note**

You can change staff assignments for programs in both the active and planning calendars. However, since programs are date-based rather than calendar-specific, changes are made to the overall program setup and affect the program for all calendars included within the program start and end dates.

### **TO REMOVE STAFF FROM PROGRAMS:**

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click School Setup.

- 3 On the School Setup page, under Program Management, click Program Setup.
- 4 Search for programs using the Basic or Detail search and select the program you want to edit.
- 5 From the Actions menu, click Setup School Info.
- 6 On the Setup School Info page, select a program session.
- 7 From the Actions menu, click Assign Staff.
- 8 In the Assign Staff to the Program section, select the staff member and click Remove.

## Setting Up Classes for Programs at the School

When you enroll a student in a program, the student is not automatically scheduled into specific classes or homerooms. If you want to create classes specifically for students who are enrolled in a program, you can use class and homeroom constraints to restrict the class to students in that program. When students are scheduled, they are assigned to classes based on the defined constraint criteria. In addition, if you want to track instructional minutes for program attendance summaries, you must create a program constraint and specify that you want to include the attendance minutes for classes with that constraint. For more information, see “Adding and Editing Student Program Details” on page 177.

Constraints can be created at the district or at the school. Constraints created at the district are available to all schools in the district. The school then has the option to apply the constraint to specific classes or homerooms or to modify a copy of the constraint. Schools cannot delete district-defined constraints. They can create their own constraints, as required.

Chancery SMS includes two types of constraints:

- Restriction constraints allow you to control the distribution of students in classes or homerooms according to a specific criteria. For example, you can create a math class for students enrolled in an academic enrichment program. Restriction constraints are available to schools using either elementary and secondary scheduling.
- Capacity Balancing constraints ensure that automated loading processes distribute students evenly among available classes based on certain criteria. For example, you may want to ensure that students in an ESL program are distributed among all English classes rather than being grouped into one class. Capacity Balancing constraints are available to schools using secondary scheduling only.

The following examples illustrate how you might set up constraints for programs at the school. For information about creating and editing constraints, see the Chancery SMS Scheduling Guide. For information about working with district constraints, see “Setting up Classes for Programs at the District” on page 75.

## Example - Setting Up an ESL Constraint at a School Using Secondary Scheduling

In this example, a school wants to balance students enrolled in their ESL program across all Basic English classes to avoid grouping the ESL students into a single class.

When classes are scheduled and students are loaded into classes using Chancery SMS automated process, such as the student loader, Chancery SMS distributes students in the ESL program across all basic English classes. For detailed information about setting up constraints at a secondary school, see the Chancery SMS Scheduling Guide.

This example assumes that the following tasks have been completed:

- The course catalog includes a Basic English course and is published to your secondary school.
- An ESL program is created and assigned to your school.

### **TO CREATE CLASS CONSTRAINT FOR ESL ENGLISH:**

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 If you are using the active calendar, on the Scheduling page, under Step 3, click Constraints.

OR

If you are using the planning calendar, on the Scheduling page, under Step 4, click Constraints.

- 4 On the Constraints page, from the Actions menu, click Add Constraint.

The Add Constraints page opens.

- 5 On the Add Constraints page, in the Define Constraint panel, enter the following information:

Field	Description
Name	Enter a name for the constraint, e.g., ELL English Program.
Program Constraint	Select this option to indicate that the constraint applies to a program.
Track Program Attendance for Classes With This Constraint	Select this option to include classes with this constraint in program attendance summaries. For more information, see “Adding and Editing Student Program Details” on page 177. <b>Note</b> To track instructional minutes for program attendance summaries, the class or homeroom must be assigned a meeting pattern. For more information about assigning meeting patterns, see the Chancery SMS Scheduling Guide.
Constraint Type	To balance students across classes, select Capacity Balancing.

- On the Select Student Criteria panel, enter the following information:

Field	Description
Program Category	Select the category the program belongs to, e.g., English Language Learners.
Program	Select the program, e.g., ELLSec. The options available are determined by the selected Program Category.
Available Sessions	The sessions available for the selected program appear in this list. Select a session, e.g., ELLSec001, and move it to the Selected Sessions list.

- On the Select Courses panel, search for the courses you want to assign the constraint to.  
  
For this example, search for English courses.
- In the Available Courses list, select Basic English and move it to the Selected Courses list.
- From the Constraint Is dropdown, select mandatory.

**Note**

At the school, you can set the constraint as mandatory, default, or available. When set as mandatory, the constraint is applied to all classes for the course and cannot be removed. If you want to apply the constraint to some classes and not others, set the constraint as default or available. When set as default, the constraint is applied to classes when they are created. If classes are created before the constraint is created, the constraint is available to those classes, but not applied automatically. To apply constraints to specific classes, see “Applying Constraints to Classes and Homerooms” on page 97.

- Click OK.

## Example - Setting Up a Remedial Math Constraint at a School Using Elementary Scheduling

In this example, a district offers remedial math classes to elementary school students and want to restrict this class to students enrolled in the elementary math tutoring program.

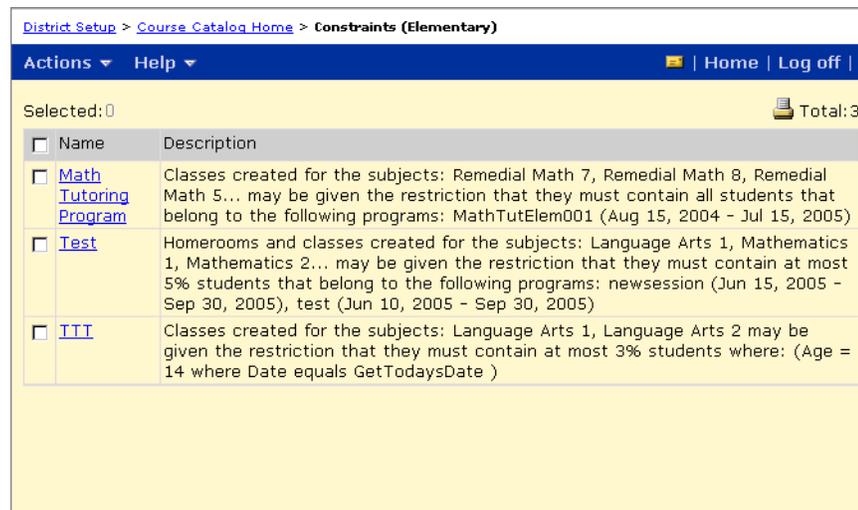
After this constraint is added, when classes are created and students are assigned to homerooms and classes using automated processes, Chancery SMS only schedules students into this math class if they are assigned to the Elementary Math Tutoring program. For detailed information about setting up constraints at an elementary school, see the Chancery SMS Scheduling Guide.

This example assumes that the following tasks have been completed:

- The course catalog includes a remedial math subject and is published to your elementary school.
- An elementary math tutoring program is created and assigned to your school.

**TO CREATE A CLASS CONSTRAINT FOR REMEDIAL MATH:**

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page under Step 3, click Constraints.



- 4 On the Constraints (Elementary) page, from the Actions menu, click Add Constraint.

The Add Constraints page opens.

- 5 On the Add Constraints page, in the Define Constraint panel, enter the following information:

Field	Description
Name	Enter a name for the constraint, e.g, Math Tutoring Program.
Program Constraint	Select this option to indicate that the constraint applies to a program.

Field	Description
Track Program Attendance for Classes With This Constraint	Select this option to include classes with this constraint in program attendance summaries. For more information, see “Adding and Editing Student Program Details” on page 177.  <b>Note</b> To track instructional minutes for program attendance summaries, the class or homeroom must be assigned a meeting pattern. For more information about assigning meeting patterns, see the Chancery SMS Scheduling Guide.
Class	For this example, set as: must contain all students matching.  <b>Note</b> If you define the constraint as “must contain”, Chancery SMS will not schedule students into the class unless they are enrolled in the selected program. If you define it as “should contain”, Chancery SMS will schedule other students if there are not enough program students to fill the schedule.

6 In the Select Student Criteria panel, enter the following information:

Field	Description
Program Category	Select the category the program belongs to, e.g., Academic Enhancement.
Program	Select the program, e.g., MathTutElem.  The options available are determined by the selected Program Category.
Available Sessions	The sessions available for the selected program appear in this list.  Select a session, e.g., MathTutElem001, and move it to the Selected Sessions list.

7 In the Selected Subjects/Homerooms panel, enter the following information:

Field	Description
Constraint is for Subjects	Select this option to apply the constraint to students being manually added to classes for specific subjects.  In this example, since we do not want to allow students to be manually assigned to these classes unless they are enrolled in the program, select this option.
Available Subjects	The subjects assigned to your school appear in the list.  Select the subjects, e.g., REMATH-05, REMATH-07, REMATH-08, and move them to the Selected Subjects list.

Field	Description
Constraint is for Homerooms	Select this option to apply the constraint to students automatically assigned to classes based on their homeroom.  In this example, since we want students enrolled in the program to be assigned to this class when they are scheduled based on their homeroom assignment, select this option.
Constraint Is	For this example, select Default.  <b>Note</b> At the school, you can set the constraint as mandatory, default, or available. When set as mandatory, the constraint is applied to all classes for the course and cannot be removed. If you want to apply the constraint to some classes and not others, set the constraint as default or available. When set as default, the constraint is applied to classes when they are created. If classes are created before the constraint is created, the constraint is available to those classes, but not applied automatically. To apply constraints to specific classes, see "Applying Constraints to Classes and Homerooms" on page 97.

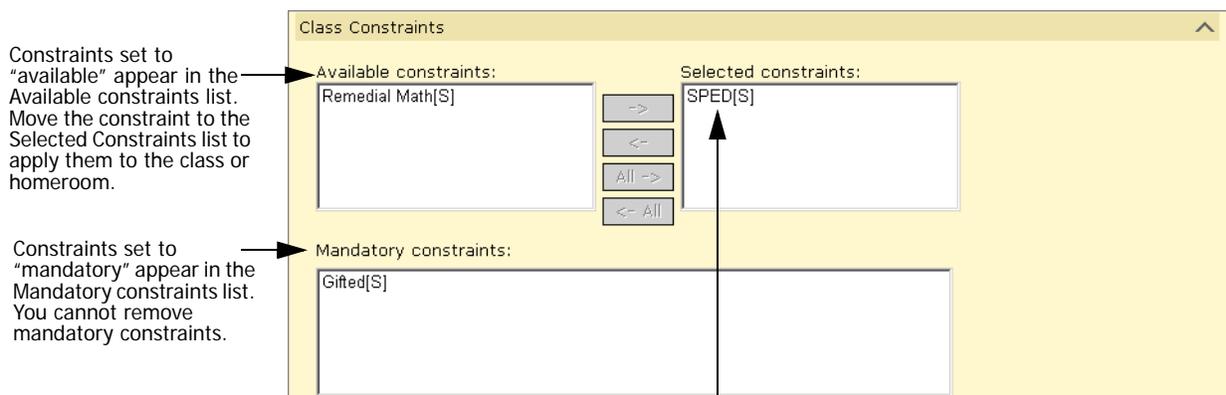
8 Click OK.

## Applying Constraints to Classes and Homerooms

After a school or district administrator sets up constraints, you can use the Apply Constraints page, Master Schedule page (secondary), or Class Setup page (elementary) to apply them to specific classes and homerooms.

Each of these pages include a Class Constraints panel that indicates which constraints are available, selected, or mandatory for the class or homeroom. The constraints in the Available Constraints, Selected Constraints, and Mandatory Constraints lists depends on how constraints were assigned to subjects, courses, or homerooms.

The following figure shows the Class Constraints panel:



Constraints set to "default" appear in the Selected constraints list when a class or homeroom is created. Move the constraint to the Available Constraints list to remove it from the class. If the class or homeroom is created before the constraint is created, the constraint appears in the Available Constraints list. Move the constraint to the Selected Constraints list to apply it to the class.

The following examples illustrate how to apply constraints. For detailed information about applying constraints, see the Chancery SMS Scheduling Guide.

### **Example - Apply Constraints to Specific Classes**

In this example, your secondary school offers a Basic English course. You want to offer two classes for Basic English, one is reserved for students in the ESL program and the other for other students in the school.

This example assumes that the following tasks have been completed:

- The course catalog includes a Basic English course and is published to your secondary school.
- Two classes are created for Basic English.
- An ESL program is created and assigned to your school.
- A constraint is created to restrict class assignment to students in the ESL program and this constraint is available to the Basic English course.

For detailed information about applying constraints, see the Chancery SMS Scheduling Guide.

#### **TO APPLY THE ESL CONSTRAINT TO ONE BASIC ENGLISH CLASS ONLY:**

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 If you are using the active calendar, on the Scheduling page, under Step 3, click Constraints.

OR

If you are using a planning calendar, on the Scheduling page, under Step 4, click Constraints.

- On the Constraints page, select the ELL English Constraint. From the Actions menu, click Apply Constraint.

- On the Apply Constraints page, from the Available Classes list, select the Basic English Class you want to restrict to students in the ELL program and move the class to the Selected Classes list.
- Click OK.
- Schedule students into the Basic English Course. For more information, see the Chancery SMS Scheduling Guide.

For secondary schools, constraints assigned to classes and courses are taken into consideration when students are scheduled using automated scheduling processes, such as the Student Loader. If you manually assign students to classes and the student does not fit the criteria, Chancery SMS displays an error message.

### Example - Applying Constraints to Homerooms

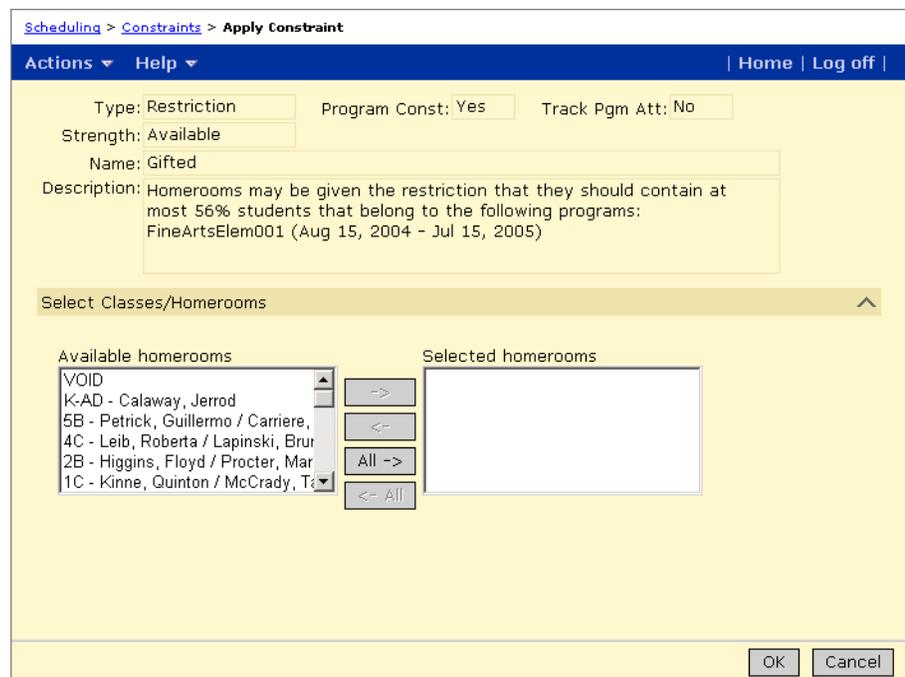
In this example, your elementary school has a Gifted and Talented program and wants to assign all students in the Gifted and Talented program to the same homeroom and have them automatically assigned to classes based on their homeroom.

This example assumes that the following tasks have been completed:

- A Gifted program is created and assigned to your school.
- A constraint is created to restrict enrollment to students in the gifted program and is available to homerooms.

**TO APPLY A CONSTRAINT TO SPECIFIC HOMEROOMS:**

- 1 Log on to an elementary school as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, under Step 3, click Constraints.
- 4 Select the Gifted constraint. From the Actions menu, click Apply Constraint.



- 5 On the Apply Constraints page, from the Available Homerooms list, select the homeroom and move it to the Selected Homerooms list.
- 6 Click OK.
- 7 Assign students to homerooms and schedule students. For more information, see the Chancery SMS Scheduling Guide.

For elementary schools, constraints are enforced at the time you assign students to homerooms or stand-alone classes. If the student does not fit the criteria, Chancery SMS displays an error message.

# SETTING UP QUEUES

Queues provide wait lists for programs and can also be used to control program capacity.

When you create a program session, Chancery SMS automatically creates a queue for students applying to the program. You can leave the criteria open to allow an unlimited number of students to be offered positions in the program or you can set a capacity limit. You can also create multiple queues for a single program to allow different capacities for different criteria. For example, you could have a General queue that has a capacity of fifty, as well as a sibling queue with a capacity of ten. You can also define how students are prioritized in the queue. They can be ranked sequentially in the order their applications were entered or randomly to create a lottery enrollment.

When students apply to a program, they are placed in a queue. If there are no eligibility criteria or capacity limits defined for the queue, the student's status is automatically set to "offered" and you only need to calculate their program eligibility before assigning them to the program.

If the queue has eligibility criteria or capacity limits, you must calculate ranks and queue status before you can offer students positions in the program.

## Permissions to Set Up Program Queues

The following table lists key tasks associated with setting up and maintaining queues:

To	You need this permission	Set to
Create new queues	Enrollment/Program Queues > Program Queue - Manage	Edit
Edit existing queues	Enrollment/Program Queues > Program Queue - Manage	Edit
Delete queues	Enrollment/Program Queues > Program Queue - Manage	Delete
Copy queues	Enrollment/Program Queues > Program Queue - Manage	Edit
Define queue eligibility criteria	Enrollment/Program Queues > Program Queue - Manage	Edit

By default, district and school administrators can set up and define queues, and define criteria used for processing program applications. District and school administrators can also edit, copy, and delete queues.

For more information about working with permissions, see the Chancery SMS Permissions Guide or “Controlling User Access” in the Chancery SMS District Administration Guide.

## Creating Queues

All programs sessions must have at least one queue. When you create a program session, Chancery SMS creates a General queue by default. Initially, the General queue has no capacity limits or other constraints and can be used for general or open enrollment.

You can create additional restrictive queues or modify the General queue to make it a restrictive queue. Restrictive queues control the number and type of students that can be placed in the queue and assigned to the program from the queue. You can create eligibility rules to specify the types of students allowed in the queue, e.g., girls only, or add capacity limits to control the number of students that can be assigned to the program from the queue. A single program session can have multiple queues and students can belong to multiple queues for the same program session. The following table describes some examples of queue types:

Queue Name	Description
Sibling	A queue for applicants where the student has a sibling already enrolled in a school or program.
Proximity	A queue for applicants where the student resides within a certain distance from the school or in a certain geographic area.
Ethnicity	A queue for applicants where the school or district balances program participation or school enrollment by ethnicity.
Principal’s Discretion	A queue for applicants where the principal determines a student should be placed in a program, regardless of queue status. For example, a student might have a status of Rejected because they do not meet the academic requirements for a program. As part of any queue, users with adequate permission can override queue status, but a school may prefer to use a special queue with a capacity of its own to limit how many seats are available.

## Understanding Queue and Program Capacities

Open queues are queues with no restrictions, including no eligibility constraints or capacity limits.

Restrictive queues can have capacity limits which can also be tied to eligibility rules. For example, a Sibling queue might have a capacity limit of 25 for siblings of existing students for a specific program. The program can also have a General queue with a capacity limit of 100.

When setting up multiple queues, the capacity of all queues combine to equal the capacity of the program. The Manage Queues page displays a summary of the capacity for a program, including the number of seats taken.

**Note**

The number of seats taken reflects the number of students assigned to the program plus the number of students whose queue status is set to “offered”.

The following figure shows a program session with two queues:

- one is a General queue with no capacity restrictions
- the other queue is restricted by eligibility criteria

**Program Information**

Program category: After School Academic  
 Program: Math Tutoring  
 Program session: Crystal High

**Queues**

Queue Name	Capacity	% Over Allowed	# Spaces Taken	# Spaces Available	# Applications
General	0	0%	12	Unlimited	12
Special Ed	15	5%	0	15	22

**Summary Table:**

	Base capacity only:	Including % over allowed:
Total capacity at this location:	15 (Unlimited)	15 (Unlimited)
Total # spaces taken at this location:	12	12
Total # spaces available at this location:	15 (Unlimited)	15 (Unlimited)
Total # applications for this location:	34	34
Overall % full for this location:	0.0 %	0.0 %

The availability of seats for a program is determined by the number of students in the program as of today. In addition, any student in a queue whose status is set to “Offered” is counted against the capacity of the program, even if the student’s program eligibility is set to “Ineligible”.

The following table describes the capacity summary fields:

Field	Description
Total capacity at this location	<p>The sum of all “Capacity” fields for each queue at this location for the program session.</p> <p>If one or more of the queues for this location has a capacity of “unlimited”, then the value in the Total field displays in italics along with “(unlimited)” next to the field.</p> <p>If all of the queues for this location have a capacity of “unlimited”, then the Total field is blank and “(unlimited)” displays next to the field.</p> <p>In the “% over Allowed” column, the % Over Allowed value is counted as “Capacity” * (1 + “% Over Allowed”). For example, where Capacity is 100 and the % Over Allowed value is 10, the Total is 110.</p>
Total # of spaces taken at this location	<p>The sum of “# Spaces Taken” fields for each queue at this location for a program session.</p> <p>If the value in the “Total # Spaces Taken” field is greater than or equal to the “Total capacity at this location”, the Total displays in red.</p> <p>The value is the same for both columns.</p>
Total # of spaces available at this location	<p>The sum of “# Spaces Available” fields for each queue at this location for a program session.</p> <p>If one or more of the queues for this location has a capacity of “unlimited”, then the value in the Total field displays in italics along with “(unlimited)” next to the field.</p> <p>If all of the queues for this location have a capacity of “unlimited”, then the Total field is blank and “(unlimited)” displays next to the field.</p> <p>If the value in the “Total # Spaces Taken” field is greater than or equal to the “Total capacity at this location”, the Total displays in red.</p> <p>The “% over Allowed” column displays the sum of the “# Spaces Available” fields for each queue at this location for a program session.</p>
Total # of applicants for this location	<p>The sum of the “# Applicants” fields for each queue at this location for a program session.</p> <p>The value is the same for both columns.</p>
Overall % full for this location	<p><math>(\text{Total \# Spaces Taken} / \text{Total Capacity}) * 100</math>.</p> <p>The “% over Allowed” column displays the “Total Capacity” * (1 + “% Over Allowed”).</p>
Queue Close Date	<p>To display this column, from the Edit menu, click Choose Columns. Move the column to the Select Columns list.</p> <p>Displays the date this queue no longer accepts applicants.</p>
Queue Elig. Rules	<p>To display this column, from the Edit menu, click Choose Columns. Move the column to the Select Columns list.</p> <p>Indicates whether eligibility rules are defined for the queue.</p>

## Understanding Rank Method

When you create a restrictive queue, you can define the order in which students can be offered positions in programs by specifying the rank method and whether the queue will consider rank weights.

### Note

In an open queue without capacity or eligibility restraints, the students' queue status is set to offered immediately in the order they enter the queue.

When students apply to a program, they are placed in the queue. If the queue is restrictive, before you can offer them a position in the program, you must calculate their rank and status within the queue. You cannot offer a student a position in the program if another student has a higher rank. The applicant's calculated rank depends on the queue's rank method and whether rank weights are used.

Two rank methods are available to queues: Sequential and Random.

Use the Sequential method to set up a simple wait list in which students are assigned ranks in the order they are entered into the queue.

Use the Random method to set up a lottery queue in which students are randomly assigned a rank and the order they are entered into the queue does not influence their placement.

For information about calculating ranks, see "Calculating Rank" on page 156.

### Note

Ranks are assigned regardless of the student's program eligibility status, so students with an Eligibility status of "Ineligible" can be assigned a rank in the queue and offered positions in the program. However, ineligible students cannot be assigned to programs.

## Understanding Rank Weights

If the queue considers rank weights, students are assigned ranks in groups according to the rank weight specified in their program application.

For example, suppose a queue contains a total of 20 applicants. Five applicants have a rank weight of 10, eight have a rank weight of 20, six have a rank weight of 30, and one has a rank weight of 1. If the queue considers rank weight, it will assign ranks to the applicants in the following order:

- The six with a rank weight of 30
- The eight with a rank weight of 20
- The five with a rank weight of 10
- The one with a rank weight of 1

Within in each group, the queue will assign ranks according to the specified rank method, e.g., sequentially or randomly.

The following figure shows the Rank Weight field on the Edit Application page:

## Defining Queues

- 1 Log on as a district administrator.
- 2 In the control bar, under Programs, click Manage Programs.
- 3 On the Program Search page, search for a program.
- 4 In the Search Results, select the program session.
- 5 From the Actions menu, click Manage Queues & Applicants.

- 6 On the Manage Queues page, do one of the following:

To	Do this
Add a queue	<ul style="list-style-type: none"> <li>From the Actions menu, click Add Queue.</li> </ul>
Edit a queue	<ol style="list-style-type: none"> <li>Under Queues, select a queue.</li> <li>From the Actions menu, click Edit Queue.</li> </ol>
Delete a queue	<ol style="list-style-type: none"> <li>Under Queues, select a queue.</li> <li>From the Actions menu, click Delete Queue.</li> <li>Click OK and skip the remaining steps.</li> </ol>

The Add Queue or Edit Queue page opens.

- 7 On the Add Queue or Edit Queue page, in the Program Information panel, review the following information for the selected session:

Field	Description
Program category	The category or type of program associated with the queue.
Program	The actual program associated with the queue.
Program session	The program session associated with the queue.
Location	The location where the program is being taught.

- 8 In the Queue Details panel, enter or edit the following information, as required:

Field	Description
Queue name	Enter the name of the queue.
Description	Enter a detailed description for this queue. Enter a description that clearly explains how the queue is to be used.
Capacity	Specify the maximum number of students that may be actively assigned to a program through this queue.
Over-capacity allowed	Indicate the percentage this queue is allowed to exceed the specified capacity. For example, an extra five percent might be designated to handle excess applications.
Rank method	Indicate whether applicants will be ranked sequentially (simple wait list) or randomly (lottery). For more information, see “Understanding Rank Method” on page 105.
Use “Rank Weight” field	Indicate whether the rank weight of the applicant, as entered on the student’s program application, is used to influence ranking. When calculating rank, where students’ have the same rank, that group is treated as a subgroup within the queue. For more information, see “Understanding Rank Weights” on page 105.
Queue close date	Enter the date when this queue is closed, i.e., will no longer accept applicants.

- 9 To work with eligibility criteria, in the Queue Eligibility Criteria panel, do any of the following:

**Note**

For information about defining eligibility criteria, including information about available functions and parameters, see the Chancery SMS Understanding Eligibility Technical Bulletin.

To	Do this
Add a criteria statement to the eligibility rule	<ol style="list-style-type: none"> <li>1 From the Category dropdown, select the type of data to be added. For example, select Attendance.</li> <li>2 Under Search By, from the first dropdown, select the field or function.</li> <li>3 From the second dropdown, select the appropriate operator (e.g., equals, is in list).</li> <li>4 In the third field, enter or select the appropriate values.</li> <li>5 If additional search by sets appear for the first set, repeat Steps 2-4 for all sets.</li> <li>6 Click Add Criteria.</li> </ol>

To	Do this
Delete a criteria statement from the eligibility rule	<ol style="list-style-type: none"> <li>1 In the Eligibility Criteria list box, click the statement to highlight it.</li> <li>2 Click Remove.</li> </ol>
Add a logical operator to define the relationships between statements	<ol style="list-style-type: none"> <li>1 In the Eligibility Criteria list box, click the statement above which you want to add the logical operator.</li> <li>2 Click AND or OR.</li> </ol>
Move a statement to another location in the eligibility rule	<ul style="list-style-type: none"> <li>• Click and drag the statement to the new location.</li> </ul>
To confirm the rule will run when calculating eligibility	<ul style="list-style-type: none"> <li>• Click Validate.</li> </ul>

10 Click OK.

For more information about eligibility criteria, see “Examples of Queue Eligibility Criteria” on page 109.

## Copying Queue Definitions

If a queue for one program session is similar to an existing queue, you can copy the queue and then make any necessary modifications.

### To COPY QUEUES:

- 1 Log on as a district administrator.
- 2 In the control bar, under Programs, click Manage Programs.
- 3 On the Program Search page, search for a program.
- 4 In the Search Results, select the program session.
- 5 From the Actions menu, click Manage Queues & Applicants.
- 6 On the Manage Queues page, select the queue you want to copy.
- 7 From the Actions menu, click Copy Queue.
- 8 Update the queue information, as necessary. Click OK.

## Examples of Queue Eligibility Criteria

Depending on how your district assigns students to programs, you may want to set up multiple queues or wait lists for programs. Using multiple queues allows you to group students who apply to program sessions. For example, you may have a General queue for all applicants and another queue for

siblings of existing participants. To control which students are allowed in each queue, you can set up eligibility criteria for the queue. Students must meet the queue criteria before they can be processed from a queue.

The following examples illustrate criteria you might use for various queues.

**Note**

Some eligibility functions and parameters may produce different results when used in the planning calendar. For example, since grades are not entered in the planning calendar, grading functions evaluate based on the active calendar. For more information, see the Chancery SMS Understanding Eligibility Rules Technical Bulletin.

**Important**

After changing or removing eligibility rules, recalculate student eligibility for queues.

## Eligibility Criteria for Sibling Queue

Designate a predefined number of seats in a program or school to siblings of existing students. Use the criteria “Sibling in School equals true” to determine if other students with the same family ID are already enrolled in the school or use the criteria “Sibling in Program equals true” to determine if other students with the same family ID are already assigned to a program session.

**Note**

To identify siblings, your district must use Family Management. For more information about Family Management, see “Entering Family Management Data” on page 149.

The screenshot shows a dialog box titled "Queue Eligibility Criteria". It contains the following fields and options:

- Category:** Program Management (dropdown)
- Search By:** Sibling in program at school (dropdown), equals (dropdown), True (dropdown)
- Where the following conditions apply:**
  - \*Start date: equals (dropdown), Start of District Calendar (dropdown)
  - \*End date: equals (dropdown), Start of District Calendar (dropdown)
  - \*Program category: equals (dropdown), After School Academic (dropdown)
  - \*Program: equals (dropdown), Math Tutoring (dropdown)
- Add Criteria** (button)

OR

## Eligibility Criteria for Proximity Queue

Use queue criteria to evaluate what areas of the district a student is from. For example, only students who live in certain neighborhoods might be eligible for a magnet program. This can be done by using criteria for school proximity or geocodes.

### Note

The School Proximity criteria is based on the value in the Miles From School field on the Apply to Program page.

## Eligibility Criteria for Ethnic Minority Queue

Designate a predefined number of seats in a program or school to students of specific ethnicities. For example, use criteria for Ethnicity = Hispanic and Ethnicity = Black. Add criteria statements for each ethnicity you want to include in the rule.

The screenshot shows a window titled "Queue Eligibility Criteria". At the top, there are three dropdown menus: "Category" (set to "Demographics"), "Search By" (set to "Ethnicity"), and "Ethnicity Description" (set to "Black or African American"). Below these is a dropdown for "equals" and a button "Add Criteria". A section titled "Eligibility Criteria" contains a list box with one entry: "Criteria: Ethnicity description equals Asian". To the left of the list box are buttons for "AND" and "OR". At the bottom of the list box are buttons for "Validate" and "Remove".

## Eligibility Criteria for Principal’s Discretion Queue

Designate a predefined number of seats in a program or school for the principal to place students who normally would not qualify for a program. For example, the principal might decide that a student should be in an Academic Enhancement program, even though their recent attendance has been poor and does not meet the program’s eligibility criteria.

As this queue is at the principal’s discretion, no criteria are necessary. Instead, make sure the user has the permissions to override program eligibility calculations.

# APPLYING TO PROGRAMS AND ENROLLING IN SCHOOLS

## Note

Before students can apply to programs, they must be registered in the district. For more information about registering students in the district, see the Chancery SMS Registration and Enrollment Quick Guide or the “Registering and Enrolling Students” section in the Chancery SMS District User Guide or Chancery SMS School User Guide.

Students must be enrolled in the school before you can assign them to a program offered at the school. If a school uses controlled enrollment, such as a magnet school, then students must be offered a position in and be eligible for a controlled enrollment program at the school before they can be enrolled in the school, and they are assigned to the program automatically as part of their school enrollment process. For more information about controlled enrollment, see “Controlling Enrollment in Schools” on page 56.

If the school offering a program does not use controlled enrollment, students can apply to the program before or after they enroll in the school. However, they cannot be assigned to the program until they are enrolled in the school.

Use the following overall procedure to assign students to programs and enroll them in the appropriate schools:

**Step 1:** Apply to the program. See “Applying to Programs” on page 117.

**Step 2:** Offer a position in the program. See “Offering Positions in Programs” on page 121.

**Step 3:** If the student is not enrolled in the school that offers the program, enroll the student in the school. See “Enrolling Students in Schools” on page 123.

## Note

If the school controls enrollment, the student must be offered a position in and be eligible for a controlled enrollment program at the school before they can enroll in the school.

**Step 4:** If the school does not use controlled enrollment, assign the student to the program. See “Assigning Students to Programs” on page 137.

## Note

If the school uses controlled enrollment, students are automatically assigned to the program when they enroll in the school.

# Permissions to Apply to Programs and Enroll in Schools

The following table lists key tasks and corresponding permissions associated with applying to programs and registering and enrolling students:

To	You need this permission	Set to
Enter applications to programs offered at schools other than your own school	Enrollment/Program Queues > Apply Students to Other Locations	Yes
Process applications and place students in programs (your school only)	Enrollment/Program Queues > Program Queue - Applicants	Delete
	Program Category - <i>Category Name</i> > Assign to Program	Yes
	Enrollment/Program Queues > Calculate Eligibility	Yes
	Enrollment/Program Queues > Program Queue - Ranking	Edit
Process applications and place students in programs (all schools)	Enrollment/Program Queues > Program Queue - Applicants	Delete
	Enrollment/Program Queues > Program Profile - See Other Schools	Yes
	Program Category - <i>Category Name</i> > Assign to Program	Yes
	Enrollment/Program Queues > Calculate Eligibility	Yes
	Enrollment/Program Queues > Program Queue - Ranking	Edit
Assign students to queues	Enrollment/Program Queues > Program Queue - Applicants	Delete
Move or copy student applications to other locations, e.g., to another school in the district	Enrollment/Program Queues > Apply Students to Other Locations	Yes
Assign eligible students to programs	Program Category - <i>Category Name</i> > Manage Participants	Delete
	Enrollment/Program Queues > Program Queue - Applicants	Delete
	Program Category - <i>Category Name</i> > Assign to Program	Yes
	Enrollment/Program Queues > Program Queue - Ranking	Delete

To	You need this permission	Set to
To perform all overrides and place students in program	Program Category - <i>Category Name</i> > Manage Participants	Delete
	Enrollment/Program Queues > Program Queue - Applicants	Edit
	Program Category - <i>Category Name</i> > Assign to Program	Yes
	Enrollment/Program Queues > Calculate Eligibility	Delete
	Enrollment/Program Queues > Program Queue - Ranking	Yes
	Enrollment/Program Queues > Program Queue - Override Capacity	Yes
	Enrollment/Program Queues > Program Queue - Override Rank	Yes
	Enrollment/Program Queues > Program Queue - Override Status	Yes
Calculate rank	Enrollment/Program Queues > Program Queue - Applicants	Edit
	Enrollment/Program Queues > Program Queue - Ranking	Delete
Enroll students in schools	Students>Registration Information	Edit
	Students > Enroll Student in School	Yes
	Students > Student Status Codes	Delete
Update student records	Students > Demographic Data	Edit
	Students > Student School Specific	Edit
	Students > Student Overview	Edit
	Students > Student Personal	Edit
	Students > Student Federal Info	Edit
	Students > Distance from School field	Edit
	Students > Lunch Status panel	Edit
	Students > Home Language Survey	Edit
	Students > Receives Specialized Services field	Edit
	Students > Background Data	Delete
Change the Home School value for students	Students > Modify Home School	Yes
	Students > Student Status Codes	
	OR Students > Demographic Data	
Edit the distance students are from a program they apply to	Enrollment/Program Queues > Miles From School	Yes

By default, district and school administrators can work with program and school applications. District and school administrators can also override eligibility criteria, ranking, and status.

There are additional permissions that apply to enrollment and working with student records. For more information, see the Chancery SMS Registration and Enrollment Quick Guide and Online Help.

## Reviewing Program Setup

While working with program applications, you may want to review the program setup that was defined at the district. Use the Program Setup Summary to review the program setup.

### TO DISPLAY THE PROGRAM SETUP SUMMARY:

- 1 Log on as a district or school administrator.
- 2 In the control bar, under Programs, click Manage Programs.
- 3 On the Manage Programs page, search for the program you want to review.
- 4 From the Search Results, click the program name.

To open the Program Setup Summary page, click the program name.

<input type="checkbox"/> Location	Student Capacity	# of Participants	# of Applicants	# of Staff
<a href="#">Transitional Bilingual Education(TBE)</a>	Transitional Bilingual Education(TBE)			
<input type="checkbox"/> Chancery High	999	1	3	0
<input type="checkbox"/> Cypress Elementary	0			0

- The Program Setup Summary displays a summary of the program setup.

Program Search > Program Setup Summary

Actions Edit Help | Home | Log off |

Transitional Bilingual Education(TBE)

Program Setup Summary

Program short code: TBE

Program state short code:

Program state description:

Additional description:

Other program interactions:

Required documentation: H-Home Language Survey,L-ELPT

Program Enrollment

Allow student assignment

Start date: 09/01/2004

End date: 06/30/2010

For grade levels: 11, 12, 3, 4, 5, 6, 7, 8, 9, Pre-Kindergarten

Control enrollment

Create pre-approved address exceptions

Sessions & Locations

District Contacts

\*Required

OK

## Applying to Programs

Before students can apply to programs or enroll in schools, they must be registered in the district. For more information about registering students in the district, see the “Registering and Enrolling Students” section in the Chancery SMS District User Guide or the Chancery SMS School User Guide.

**TO APPLY TO A PROGRAM:**

- 1 Log on as a district or school administrator.
- 2 To apply to a program, do one of the following:

When working with this page	Do this
Home page	<ol style="list-style-type: none"> <li>1 From the Actions menu, click Register/Enroll Student.</li> <li>2 Search for a student. From the Search Results, in the Student Name column, click the students name.</li> <li>3 On the Registration/Enrollment Steps page, click Apply to Program.</li> </ol> <p><b>Note</b> When enrolling a student in a school, you can use other links on the Registration/Enrollment Steps page to enter additional information about the student that might be used to calculate the student's eligibility for programs.</p>
Student Demographics	<ol style="list-style-type: none"> <li>1 In the control bar, click Program Profile.</li> <li>2 From the Actions menu, click Apply to Program.</li> </ol>
Student Search Results	<ol style="list-style-type: none"> <li>1 From any student search result, select one or more students.</li> <li>2 From the Actions menu, click Apply to Program.</li> </ol>

- 3 On the Apply to Program page, enter the following information, as required:

Field	Description
Program Category	Select the program category. For example, Academic Enhancement.
Program	Select the program. The programs available in this list depend on which program category is selected.
Program session	Select the program session.
Location	Select a location.  <b>Note</b> Depending on your permissions, this list may include all schools in the district or only your school and N/A.
Miles From School	Specify the distance the student would travel to attend this program session.  This value can be used in queue eligibility rules to set criteria for school proximity.  <b>Note</b> Depending on your permissions, this field may be read-only.

Field	Description
Queue	Select the queue you want to place the student in. Pick the queue through which the student is most likely to be eligible. <b>Note</b> To place students in multiple queues for the same program session, enter multiple applications. Depending on the number of applicants and the eligibility criteria of a queue, students might not qualify through one queue but may qualify through another.
Preference	Enter a preference rating for this program session, such as 1, 2 or 3, with 1 being the student’s first placement choice. <b>Note</b> The setting is not used by automated processes, but may be useful when manually assigning students to programs.
Rank Weight	Enter a rank weight value. Some queues consider a student’s rank weight when determining the students’ rank order. When rank weights are used, the higher the rank weight the higher the student’s assigned rank. For example a student with a rank weight of 10 will receive a higher rank than a student with a rank weight of 1. For more information about how rank is determined, see “Understanding Rank Method” on page 105.

- Under Forms Received, indicate any forms received from this student for this program application. Not all programs are set up to collect specific forms.

Enter the following information, as required:

Field	Description
Form Name	Select the application, document, referral, or other form identified as being required for application to the program.
Received Date	Indicate the month, day, and year that the form was submitted to the office.
Received By	Enter the name of the staff member who accepted the form.
Verified Date	Indicate the month, day, and year the form was verified by a staff member.
Verified By	Enter the name of the staff member who verified the responses on the form, or who accepted the referral or preference.

- To track additional forms, from the Actions menu, click Add Row > Form. Enter the necessary information.
- Click Continue.

The Program Queues page opens.

- 7 To calculate student eligibility, on the Program Queues page, in the # Applicants column, click the number corresponding to the queue the student was added to.

**Note**

Eligibility rules are based on student information. Before calculating eligibility, make sure all the relevant information is entered for the student.

- 8 On the Manage Applicants page, do the following, as required:

To	Do this
Calculate queue status	<p><b>Note</b> If no eligibility rules or capacity limits are defined for the queue, the student's status is automatically set to "Offered" and you do not need to calculate queue status. Also, if only capacity limits are defined for the queue, the student's status is automatically set to "Waiting" and you do not need to calculate queue status. If space is available, you can offer the student a position in the program. For more information, see "Offering Positions in Programs" on page 121.</p> <ol style="list-style-type: none"> <li>1 From the Actions menu, click Calculate Status.</li> <li>2 Select the Applicants you want to calculate status for and click OK.</li> </ol> <p>For more information about calculating queue status, see "Calculating Queue Status" on page 151.</p>
Calculate eligibility status	<p><b>Note</b> The available eligibility rules are based on the rule dates assigned to defined rules. If no eligibility rules are available for the program, you cannot calculate eligibility status and can skip this step.</p> <ol style="list-style-type: none"> <li>1 In the Eligibility Calculations section, select the eligibility rule that applies to the students.</li> <li>2 In the Applicants section, select the students.</li> <li>3 From the Actions menu, click Calculate Eligibility</li> <li>4 Click OK.</li> </ol> <p>For more information about calculating program eligibility, see "Calculating Program Eligibility" on page 153.</p>
Calculate rank	<p><b>Note</b> If no eligibility rules or capacity limits are defined for the queue, students are automatically offered positions in the program. You do not need to calculate rank.</p> <ol style="list-style-type: none"> <li>1 From the Actions menu, click Calculate Rank.</li> <li>2 Select the students you want to include in the rank calculation and click OK.</li> </ol> <p>For more information about calculating rank, see "Calculating Rank" on page 156.</p>

- 9 When the student's Eligibility Status is calculated and updated, if the student's queue status is "Waiting", you can offer the student a position in the program in their rank order. For more information about offering positions, see "Offering Positions in Programs" on page 121. If the student's queue status is "Offered", you can enroll the student in the school and/or assign them to the program. For more information, see "Enrolling Students in Schools" on page 123 and "Assigning Students to Programs" on page 137.

## Offering Positions in Programs

If students are placed in a queue that has eligibility rules or capacity limits, you must calculate the student's rank and queue status, and then offer positions in the program. If the queue has no eligibility rules or capacity limits, the student's queue status is automatically set to "Offered". Offering a position in a program reserves space in the program for the student. The number of seats taken in the program is incremented for each student whose queue status is set to "Offered".

### Note

You can offer students a position in a program even if their eligibility status for the program is set to "Ineligible". However, you can only assign a student to a program if both their program eligibility status is set to "Eligible" and their queue status is set to "Offered".

Before you can offer students a position in a program, you must calculate their queue status and rank. You can only offer positions to students whose queue status is set to "Waiting" and whose rank is the highest in the queue. For more information about calculating queue status, see "Calculating Queue Status" on page 151. For more information about calculating ranks, see "Calculating Rank" on page 156.

You can select single or multiple students to offer positions to. If you select multiple students, they are offered positions in their rank order. You cannot offer a position to a student whose rank is lower than another student in the queue.

### Note

If you are unable to offer a student a position in the program because other students have a higher calculated rank, and you have permission to override ranks, you can manually adjust the student's rank. For more information about overriding calculated ranks, see "Assigning Specific Ranks" on page 161.

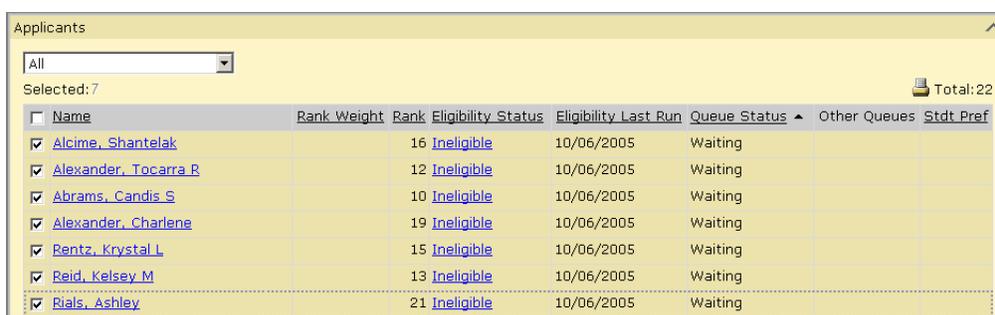
After you offer a student a position in a program, if a student who is eligible for the program is not enrolled in the school where the program is offered, enroll them in the school. For more information, see "Enrolling Students in Schools" on page 123. If the student is already enrolled in the school, you can assign them to the program, see "Assigning Students to Programs" on page 137.

### Note

If the school uses controlled enrollment and the "Create AV Exception" option is selected for the program, when you offer the student a position in the program, Chancery SMS automatically creates an address validation exception at the school for the student so you can enroll them in the school.

**TO OFFER A POSITION IN A PROGRAM:**

- 1 Log on as a district or school administrator.
- 2 In the control bar, under Programs, click Manage Programs.
- 3 On the Program Search page, search for and select the program session you want to offer.
- 4 From the Actions menu, click Manage Queues & Applicants.
- 5 On the Program Queues page, in the # Applicants column, click the number corresponding to the session you want to offer.
- 6 On the Manage Applicants page, under Applicants, select one or more students to whom you want to offer a position.



- 7 From the Actions menu, select from:

Option	Reason
Offer Position	<p>For any student with a queue status of “Waiting”, you can offer them a position in the program.</p> <p>When the student’s queue status is set to “Offered” and the student’s eligibility status is set to “Eligible”, you can do one of the following:</p> <ul style="list-style-type: none"> <li>• If the student is not enrolled in the school where the program is offered, enroll the student in the school. See “Enrolling Students in Schools” on page 123.</li> <li>• If the student is enrolled in the school where the program is offered, assign the student to the program. See “Assigning Students to Programs” on page 137.</li> </ul>
Decline Position	<p>If a student declines an offered position, select Decline Position.</p> <p>The student’s status is set to “Declined”. The student remains in the queue and their ranking is cleared.</p>
Reset to New	<p>If you make an error and need to reset a student’s queue status and ranking or if you determine that a student is not eligible for the program but do not want to remove their application from the queue, select Reset to New.</p> <p>This option clears the existing queue status and rank for the student.</p>

- 8 Click OK.

## Enrolling Students in Schools

To participate in a program, a student must be enrolled in the school where the program is offered. If the school offering the program uses controlled enrollment and a student who has applied to the program is not enrolled in the school, enroll them in the school after you offer them a position in the program and calculate their program eligibility. For more information about controlled enrollment, see “Controlling Enrollment in Schools” on page 56. For information about enrolling students in schools with controlled enrollment, see “Enrolling Students in Schools With Controlled Enrollment” on page 128.

If the school offering the program does not use controlled enrollment, you can enroll students in the school either before or after you offer them a position in a program and calculate their eligibility. However, students must be enrolled in the school before you can assign them to a program offered at the school. For information about enrolling students in schools that do not use controlled enrollment, see “Enrolling Students in Schools With Open Enrollment” on page 123.

## Enrolling Students in Schools With Open Enrollment

Students can enroll in schools that do not use controlled enrollment either before or after they apply to and are offered a position in a program at that school.

### **TO ENROLL A STUDENT IN A SCHOOL WITHOUT CONTROLLED ENROLLMENT:**

- 1 Log on as a district or school administrator.

#### **Note**

Make sure the student is registered in the district. For more information, see the Chancery SMS District User Guide, the Chancery SMS School User Guide, or the Chancery SMS Registration and Enrollment Quick Guide.

2 Do one of the following:

When working with this page	Do this
Home page	<p><b>Note</b> When enrolling a student in a school, you can use other links on the Registration/Enrollment Steps page to enter additional information about the student that might be used to calculate the student's eligibility for programs.</p> <ol style="list-style-type: none"> <li>1 From the Actions menu, click Register/Enroll Student.</li> <li>2 Search for a student. From the Search Results, in the Student Name column, click the student's name.</li> <li>3 On the Registration/Enrollment Steps page, click "Enroll Student in a School".</li> </ol> <p><b>Note</b> If you log on as a school administrator, this link is not available if, on the District Preferences page, the "Control access to the "Enroll Student in a School" link for school users" option is selected, the student is already enrolled in another school, and an address exception does not exist for the student for your school.</p>
Student Demographics	<ul style="list-style-type: none"> <li>• In the control bar, click Enrollment.</li> </ul>

3 On the Enrollment page, do one of the following:

If	Do this
The student is enrolled in a school in the district.	<ul style="list-style-type: none"> <li>• Click Add.</li> </ul> <p><b>Note</b> Students can only be enrolled in multiple schools, if district preferences allow students to be active in more than one school. For more information, see "Setting Program Management District Preferences" on page 22.</p>
The student is not enrolled in a school in the district.	<ul style="list-style-type: none"> <li>• Click Enroll.</li> </ul>

The Add Status Code page opens.

- 4 On the Add Status Code page, enter the following information, as required:

Field	Description
Home School	Enter the student’s home school.  <b>Note</b> Depending on your permissions, this field may be read-only. If you log on as a school administrator, depending on district preferences, this list may only include your school and N/A and you may not be able to set the student’s home school to another school in the district.
Date	Enter the date you want the enrollment status code to begin.
Status Code	Select the appropriate Entry or Withdrawal enrollment status code.
Grade	Select the grade the student will be in when enrolled in the School of Enrollment.
Zoned School (Active)	If your district uses Address Validation and the district preference is set to “Check student addresses against school zones”, this field is visible.  This field displays the student’s zoned school for the current year. After you enter Date and Grade, click Update to display the student’s Zoned School.  For more information, see the Chancery SMS Address Validation Guide.

Field	Description
School of Enrollment	<p>Select the school the student is enrolling in.</p> <p>The school can be different from the student’s Home School. For example, a student might receive traditional instruction at School A in the mornings and then attend vocational classes at School B in the afternoons.</p> <p><b>Note</b> If the selected school has controlled enrollment programs, the fields on the page change. For more information about enrolling students in schools with controlled enrollments, see “Enrolling Students in Schools With Controlled Enrollment” on page 128.</p>
Exception Reason	<p>If your district uses address validation and the Zoned School is different from the School of Enrollment, select the reason the student requests to enroll 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. A message displays asking if you want Chancery SMS to generate an approval request. If the district approves the request, you can enroll the student in the school.</p>
Distance from school	<p>Enter the distance from the school to the student’s home address.</p> <p>This field is used by Transportation programs. For more information about setting up transportation programs, see “Setting up Transportation Programs” on page 53.</p>
Student’s address is in school’s area	<p>If the student’s home address meets any boundary conditions for the school, such as physical area borders, select this checkbox.</p> <p>This field is used by Transportation programs. For more information about setting up transportation programs, see “Setting up Transportation Programs” on page 53.</p>
Comment	<p>If necessary, enter a comment associated with the status code.</p>
Physical Address	<p>If your district uses Address Validation, when you select an entry-type status code, the Physical Address section appears. To select and validate the student’s address, click Select Address.</p> <p><b>Note</b> If the student is not yet enrolled in a school in the district, this section does not display on the Add Status Code page. Instead, select and validate the address on the Student Demographics page. For more information, see the Chancery SMS Address Validation Addendum.</p>

The Projected Enrollment for Planning Calendar” panel appears on the page for all active enrollments.

An active enrollment is an enrollment record with a status type of entry or re-entry (status types are defined in the Status Code setup list) that does not have a corresponding withdrawal record when the date of the enrollment record is on or before the district active calendar end date.

**Note**

The Projected Enrollment for Planning Calendar panel does not appear until the student is enrolled in at least one school. When you enroll a student into their first school, apply the changes and then edit their enrollment to set the project enrollment for the planning calendar.

**Note**

You cannot project the student's next year enrollment if:

- The program associated with the enrollment will not continue in the next active year (i.e., it has an end date within the current active year)
- A planning calendar is created, but program sessions for the program associated with the enrollment are not available in the planning calendar.
- The school the student wants to attend controls enrollment and the student is not already enrolled in that school. (The student must apply to a program at the controlled-enrollment school, be offered a position in the program, and enroll in the school).

- 5 If available, under the “Projected Enrollment for Planning Calendar” panel, enter the following information, as required:

Field	Description
Zoned School (Projected)	Displays the school the student is projected to attend in the next school year for this school of enrollment. This value is based on the Year End Transfer method used by the district.  For more information about year-end transfer methods, see the Chancery SMS Next-Year Preparation and Year-End Processing Guide.
Requested School	If the student does not want to attend their zoned school in the next school year for this school of enrollment, select the school the student will attend.  The schools available in this list only include schools in the district that do not control enrollment.  <b>Note</b> If the student will no longer attend this school of enrollment, for example, they were attending an Advanced Math program at this school and do not plan to continue, set their Requested School value to “None”. During the Next-Year Preparation process, the student will be withdrawn from the school and not enrolled in another school for this enrollment.
Projected Grade	Displays the student’s projected grade level for this school of enrollment.  <b>Note</b> This field is blank until the student is enrolled in the school.

- 6 Click OK.

## Enrolling Students in Schools With Controlled Enrollment

If the school uses controlled enrollment, students must be eligible for and offered positions in a controlled enrollment program at the school before you can enroll them in the school. For information about controlled enrollment, see “Controlling Enrollment in Schools” on page 56. For information about applying to programs, see “Applying to Programs” on page 117.

### TO ENROLL STUDENTS IN SCHOOLS WITH CONTROLLED ENROLLMENT:

- 1 Log on as a district or school administrator.

#### Note

Make sure the student is registered in the district. For more information, see the Chancery SMS District User Guide, the Chancery SMS School User Guide, or the Chancery SMS Registration and Enrollment Quick Guide.

- 2 Do one of the following:

When working with this page	Do this
Home page	<ol style="list-style-type: none"> <li>1 From the Actions menu, click Register/Enroll Student.</li> <li>2 Search for a student. From the Search Results, in the Student Name column, click the student’s name.</li> <li>3 On the Registration/Enrollment Steps page, click “Enroll Student in a School”.</li> </ol> <p><b>Note</b> If you log on as a school administrator, this link is not available if, on the District Preferences page, the “Control access to the “Enroll Student in a School” link for school users” option is selected, the student is already enrolled in another school, and an address exception does not exist for the student for your school.</p>
Student Demographics	<ul style="list-style-type: none"> <li>• In the control bar, click Enrollment.</li> </ul>

- 3 On the Enrollment page, do one of the following:

If	Do this
The student is enrolled in a school in the district.	<ul style="list-style-type: none"> <li>• Click Add.</li> </ul> <p><b>Note</b> Students can only be enrolled in multiple schools, if district preferences allow students to be active in more than one school. For more information, see “Setting Program Management District Preferences” on page 22.</p>
The student is not enrolled in a school in the district.	<ul style="list-style-type: none"> <li>• Click Enroll.</li> </ul>

The Add Status Code page opens.

4 On the Add Status Code page, enter the following information:

Field	Description
Home School	Enter the student’s home school. <b>Note</b> Depending on your permissions, this field may be read-only. If you log on as a school administrator, depending on district preferences, this list may only include your school and N/A and, if the student is actively enrolled in another school that is set as their home school, you cannot change their home school.
Date	Enter the date you want the enrollment status code to begin.
Status Code	Select the appropriate Entry or Withdrawal enrollment status code.
Grade	Select the grade the student will be in when enrolled in the School of Enrollment.
Zoned School (Active)	If your district uses Address Validation and the district preference is set to “Check student addresses against school zones”, this field is visible. This field displays the student’s zoned school for the current year. After you enter Date and Grade, click Update to display the student’s Zoned School. For more information, see the Chancery SMS Address Validation Guide.
School of Enrollment	Select the school the student is enrolling in. The school can be different from the student’s Home School. For example, a student might receive traditional instruction at School A in the mornings and then attend vocational classes at School B in the afternoons.

Field	Description
Exception Reason	<p>If your district uses address validation and the Zoned School is different from the School of Enrollment, select the reason the student requests to enroll 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. A message displays asking if you want Chancery SMS to generate an approval request. If the district approves the request, you can enroll the student in the school.</p>
Program	<p>When the district is using one or more programs to control enrollment at this school, this field appears.</p> <p>Select the controlled enrollment program the student has been offered a position in and is eligible for. For more information about controlled enrollment, see “Controlling Enrollment in Schools” on page 56.</p> <p>For information about applying to programs and sessions, see “Applying to Programs” on page 117.</p>
Session	<p>When the district is using one or more programs to control enrollment at this school, this field appears.</p> <p>Select the program session the student has been offered a position in. The sessions available depending on the program selected from the Program dropdown.</p> <p>For information about applying to programs and sessions, see “Applying to Programs” on page 117.</p>
Queue	<p>When the district is using one or more programs to control enrollment at this school, this field appears.</p> <p>Select the queue the student is assigned to for the selected program and session.</p> <p>The options available depend on the program selected from the Program dropdown. The queues available are those that are defined for the Program and have not passed their “Close date”.</p>
Program Status	<p>When the district is using one or more programs to control enrollment at this school, this field appears.</p> <p>After you select a program, a session, and a queue, this field displays the students status for the program.</p> <p><b>Note</b> You can only enroll students in the school if their program eligibility is “Eligible” and their queue status is “Offered”. For more information about calculating eligibility, see “Calculating Student Eligibility” on page 151.</p>
Program Override Reason	<p>When the district is using one or more programs to control enrollment at this school, this field appears.</p> <p>If the student’s status is not “Offered” or the student is not eligible for the program, and you have the necessary permission to override the eligibility criteria, to enroll the student in the program, specify an override reason.</p>

Field	Description
Additional Override Details	When the district is using one or more programs to control enrollment at this school, this field appears.  If you override the program status, you can specify additional information about your reasons.
Distance from school	Enter the distance from the school to the student’s home address.  This field is used by Transportation programs. For more information about setting up transportation programs, see “Setting up Transportation Programs” on page 53.
Home address is in school’s area	If the student’s home address meets any boundary conditions for the school, such as physical area borders, select this checkbox.  This field is used by Transportation programs. For more information about setting up transportation programs, see “Setting up Transportation Programs” on page 53.
Comment	If necessary, enter a comment associated with the status code.
Physical Address	If your district uses Address Validation, when you select an entry-type status code, the Physical Address section appears. To select and validate the student’s address, click Select Address.  <b>Note</b> If the student is not yet enrolled in a school in the district, this section does not display on the Add Status Code page. Instead, select and validate the address on the Student Demographics page.  For more information, see the Chancery SMS Address Validation Addendum.

For active student enrollments in districts that have Chancery SMS schools only (i.e., no schools using Win School or Mac School), the “Projected Enrollment for Planning Calendar” panel appears on the Status Code page.

An active enrollment is an enrollment record with a status type of entry or re-entry (status types are defined in the Status Code setup list) that does not have a corresponding withdrawal record when the date of the enrollment record is on or before the district active calendar end date.

**Note**

The Projected Enrollment for Planning Calendar panel does not appear until the student is enrolled in at least one school. When you enroll a student into their first school, apply the changes and then edit their enrollment to set the project enrollment for the planning calendar.

**Note**

You cannot project the student’s next year enrollment if:

- The program associated with the enrollment will not continue in the next active year (i.e., it has an end date within the current active year)

- A planning calendar is created, but program sessions for the program associated with the enrollment are not available in the planning calendar.
  - The school the student wants to attend controls enrollment and the student is not already enrolled in that school. (The student must apply to a program at the controlled-enrollment school, be offered a position in the program, and enroll in the school).
- 5 If available, under the “Projected Enrollment for Planning Calendar” panel, enter the following information, as required:

Field	Description
Zoned School (Projected)	<p>Displays the school the student is projected to attend in the next school year for this school of enrollment. This value is based on the year-end transfer method used by the district.</p> <p>For more information about year-end transfer methods, see the Chancery SMS Next-Year Preparation and Year-End Processing Guide.</p>
Requested School	<p>If Program Management controls the planning calendar requested school for this program and the student is not in a graduating grade for this school, this field displays the student’s projected school for this school enrollment.</p> <p>If Program Management does not control the planning calendar school for this program or program management does control this value and the student is in a graduating grade for this school, if the student will attend a school other than their zoned school, select the school the student will attend in the next year for this school enrollment.</p> <p><b>Note</b> If the student will no longer attend this school of enrollment (e.g., they were attending an Advanced Math program at this school and do not plan to continue), set their Requested School value to “None”. During the Next-Year Preparation process, the student will be withdrawn from the school and a new enrollment record will not be created.</p> <p>For more information about setting the “Planning Calendar ‘Requested School’ controlled by program management” option, see “Setting Planning Calendar Options” on page 17.</p>
Projected Grade	<p>Displays the student’s projected grade for this school of enrollment.</p>

- 6 Click OK.

The student is enrolled in the school and automatically assigned to the specified program.

# Transferring Students to Schools Where Programs are Offered

If a student is enrolled in a school, but wants to transfer to a different school where a program is offered, you can transfer the student using one of the following methods:

To	See
Transfer one or more students using mid-year transfer	“Transferring Students Using Mid-Year Transfers” on page 133
Withdraw and enroll individual students	“Transferring Individual Students Using Enrollment Status Codes” on page 137

## Transferring Students Using Mid-Year Transfers

If your district allows mid-year transfers, you can use the Enrollment page to transfer students from one school to another within the district. When you use a mid-year transfer, information about the transferring student can be made available to the receiving school. For more information about mid-year transfers, see the Chancery SMS District User Guide.

### Note

To transfer students using the mid-year transfer method, your user account must have the Mid Year Student Transfers permission set to Edit. If you do not have adequate permissions, transfer students one at a time using enrollment status codes. For more information, see “Transferring Individual Students Using Enrollment Status Codes” on page 137.

The process used for mid-year transfers depends on whether the school uses open enrollment (see “Transferring Students to Open Enrollment Schools” on page 133) or controlled enrollment (see “Transferring Students to Controlled Enrollment Schools” on page 135).

## Transferring Students to Open Enrollment Schools

Students can apply to and be offered positions in programs at schools that do not control enrollment either before or after they transfer to the school. For information about applying to programs, see “Applying to Programs” on page 117. For information about offering positions in programs, see “Offering Positions in Programs” on page 121.

### TO TRANSFER STUDENTS TO AN OPEN-ENROLLMENT SCHOOL:

- 1 Log on as a district or school administrator.
- 2 Open a student record.

- 3 In the control bar, click Enrollment.
- 4 On the Enrollment page, click Transfer.
- 5 On the Transfer to School page, in the Status Codes section, enter the following information, as required:

Field	Description
Withdrawal Date	Enter the first day that the students do not attend the school they are transferring from.
Withdrawal Code	Select a Withdrawal status code.
Current School	Select the school the students are transferring from. The options available include schools the students are actively enrolled in and that your user account has permission to work with.
First Day in New School	Enter the day that the students start at the new school. The default is today.
Entry Code	Select an Entry status code.
New School	Select the school that the students are transferring to. <b>Note</b> If the selected school has controlled enrollment programs, the fields on the page change. For more information about transferring students to schools with controlled enrollment, see “Transferring Students to Controlled Enrollment Schools” on page 135.
Make this the Home School	Select this option to set the new school as the students’ Home School.
Comment	Enter a comment of up to 101 characters.

- 6 In the School-Owned Data to Transfer/Report section of the page, determine how to provide the specified data to the new school:
  - Select Report to provide a PDF file.
  - Select Transfer to provide an ASCII download that the school can later import.
- 7 Click OK.

A message indicates whether the transfer was successful.

- 8 To close the Transfer to School page, click OK.

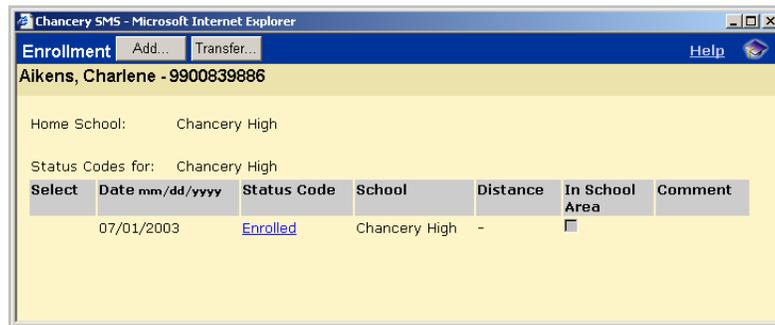
After the students are enrolled in the school, you can assign them to any programs they have been offered positions in. For more information, see “Assigning Students to Programs” on page 137.

## Transferring Students to Controlled Enrollment Schools

Before you can transfer students to schools that control enrollment, the students must apply to at least one controlled-enrollment program at that school and be eligible for and offered a position in a controlled-enrollment program. For more information about applying to programs, see “Applying to Programs” on page 117. For more information about offering positions in programs, see “Offering Positions in Programs” on page 121.

### TO TRANSFER STUDENTS TO A CONTROLLED-ENROLLMENT SCHOOL:

- 1 Log on as a district or school administrator.
- 2 Open a student record.
- 3 In the control bar, click Enrollment.
- 4 On the Enrollment page, click Transfer.



- 5 On the Transfer to School page, in the Status Codes section, enter the following information, as required:

Field	Description
Withdrawal Date	Enter the first day that the students do not attend the school that they are transferring from.
Withdrawal Code	Select a Withdrawal status code.
Current School	Select the school the students are transferring from. The options available include schools the students are actively enrolled in and that your user account has permission to work with
First Day in New School	Enter the day the students start at the new school.
Entry Code	Select an Entry status code.
New School	Select the school the students are transferring to. <b>Note</b> 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.

Field	Description
Make this the Home School	Select this option to set the new school as the students' Home School.
Program	If the school is using one or more programs to control enrollment at the selected school, this field appears. Select the controlled enrollment program the student has been offered a position in. For more information about controlled enrollment, see "Controlling Enrollment in Schools" on page 56.
Session	If the school is using one or more programs to control enrollment at the selected school, this field appears. Select the program session the student has been offered a position in. The sessions available depend on the program selected from the Program dropdown. For information about applying to programs and sessions, see "Applying to Programs" on page 117.
Queue	If the district is using one or more programs to control enrollment at the selected school, this field appears. Select the queue the student is assigned to for the selected program and session. The options available depend on the program selected from the Program dropdown. The queues available are those that are defined for the Program and have not passed their "Close date".
Program Status	If the district is using one or more programs to control enrollment at the selected school, this field appears. After you select a program, a session, and a queue, this field displays the students status for the program.
Program Override Reason	If the district is using one or more programs to control enrollment at the selected school, this field appears. If the student's status is not "Offered" and you have the necessary permission to override the eligibility criteria, to enroll the student in the program, specify an override reason.
Additional Override Details	If the district is using one or more programs to control enrollment, this field appears. If you override the program status, you can specify additional information about your reasons.
Comment	Enter any additional information about this transfer.

- 6 In the School-Owned Data to Transfer/Report section of the page, determine how to provide the specified data to the new school:
  - Select Report to provide a PDF file.
  - Select Transfer to provide an ASCII download that the school can later import.

7 Click OK.

A message indicates whether the transfer was successful.

8 To close the Transfer to School page, click OK.

## Transferring Individual Students Using Enrollment Status Codes

If you do not have permission to transfer students using the Mid-Year Transfer method, you can use entry- and withdrawal-type status codes to process individual students. Depending on how your district controls enrollment, you might only be able to enroll a student in one school at a time. The following table explains your enrollment options:

District Enrollment Preference	Do this
Student can be active in more than one school	Enroll the student in the school where the program is offered, retaining the enrollment record in the current school.
Student can be active in one school at a time	Withdraw the student from their current school and enroll in the school where the program is offered.

To transfer individual students and assign them to programs, complete these steps:

- Apply to programs at the new school. See “Applying to Programs” on page 117
- Offer the students positions in the program. See “Offering Positions in Programs” on page 121
- Enroll the students in the new school. See “Enrolling Students in Schools” on page 123
- If the school does not use controlled enrollment, assign the students to the program. See “Assigning Students to Programs” on page 137

## Assigning Students to Programs

Before you can assign students to programs, they must be enrolled in the school that offers the program.

### Note

If the program controls enrollment and you select the program when you enroll the student in the school, the student is automatically assigned to the program when they are enrolled in the school. For more information, see “Enrolling Students in Schools With Controlled Enrollment” on page 128.

If a program does not control enrollment, once the student is enrolled in the school that offers the program and after the student applies for, is eligible, and is offered a position in the program, you can assign them a position in the program. For more information about applying to programs, see “Applying to Programs” on page 117.

**TO ASSIGN STUDENTS TO PROGRAMS:**

- 1 Log on as a district or school administrator.
- 2 In the control bar, under Programs, click Manage Programs.
- 3 On the Program Search page, search for and select the program session you want to assign students to.
- 4 From the Actions menu, click Manage Queues & Applicants.
- 5 On the Program Queues page, under Queues, in the # Applicants column, click the number corresponding to the queue you want to assign students from.

Program Search > Program Queues

Actions Edit Help | Home | Log off |

Cypress Elementary

Program Information

Program category: After School Programs

Program: After School Counts

Program session: ASC001

Queues

Selected: 0 Total: 3

<input type="checkbox"/>	Queue Name	Capacity	% Over Allowed	# Spaces Taken	# Spaces Available	# Applications
<input type="checkbox"/>	General	0	0%	0	Unlimited	0
<input type="checkbox"/>	General_adm	50	0%	10	40	33
<input type="checkbox"/>	special_ed	25	0%	0	25	0

To add a queue, from the Actions menu, click Add Queue...

	Base capacity only:	Including % over allowed:
Total capacity at this location:	75 (Unlimited)	75 (Unlimited)
Total # spaces taken at this location:	10	10
Total # spaces available at this location:	65 (Unlimited)	65 (Unlimited)
Total # applications for this location:	33	33
Overall % full for this location:	0.0 %	0.0 %

- 6 On the Manage Applicants page, under Applicants, select one or more students that you want to assign to the program.

**Note**

If you need to calculate the students' eligibility, see “Calculating Student Eligibility” on page 151.

- 7 From the Actions menu, click Assign to Program.

- 8 On the Assign to Program page, enter the effective date. Click OK.

If the student does not meet all the eligibility criteria or the program capacity has been reached and you have permission to override eligibility criteria, additional fields are available to allow you to enroll the student in the program.

Assign To Program -- Web Page Dialog

Enter the effective date for the student assignment to this program.

\*Effective Date:  Today  
 Tomorrow  
 Specify:  mm/dd/yyyy

The student that you selected cannot be assigned to the program for one of the following reasons:

- Student's queue status is not 'Offered'
- Student is not ranked and the higher ranked student is not 'Offered'
- Capacity of program indicates that seats are not available
- Student's program eligibility status is not 'Eligible'

To continue with the program assignment, enter an override reason for the ineligible student(s) and then click 'OK', otherwise click 'Cancel'. Selecting 'Cancel' will not assign any of the pre-selected students to the program.

\*Override reason:

Override by:

Additional details:

\*Required

When students are accepted into a program, they are removed from all queues they were assigned to for that program.

## Editing Program Applications

Once a student has applied to a program, you can edit the details of the program application, if necessary. You can edit or delete a student's application when you are working with student information or while you are working with a program.

**TO EDIT OR DELETE APPLICATIONS:**

- 1 Log on as a district or school administrator.
- 2 Do one of the following:

To	Do this
Work with students	<ol style="list-style-type: none"> <li>1 Open a student record.</li> <li>2 In the control bar, click Program Profile.</li> <li>3 On the Program Profile page, under Applications, select the program you want to work with.</li> <li>4 From the Actions menu, click Edit Application.</li> </ol>
Work with programs	<ol style="list-style-type: none"> <li>1 In the control bar, under Programs, click Manage Programs.</li> <li>2 On the Program Search page, search for the program.</li> <li>3 In the # Applicants column, click the number that corresponds to the program session.</li> <li>4 On the Program Queues page, in the # Applicants column, click the number that corresponds to the queue.</li> <li>5 On the Manage Applicants page, select the students you want to work with.</li> <li>6 From the Actions menu, click Edit Applicants.</li> </ol>

- 3 On the Edit Application page, enter or edit the following information, as required.

Field	Description
Preference	<p>Enter a preference rating for this program session, such as 1, 2, or 3, with 1 being the student's first placement choice. This is helpful when a student applies to multiple program sessions.</p> <p><b>Note</b> The setting is not used by automated processes, but may be useful when manually assigning students to programs.</p>
Rank Weight	<p>Enter a rank weight value.</p> <p>Some queues consider a student's rank weight when determining the students' rank order. When rank weights are used, the higher the rank weight the higher the student's assigned rank. For example, a student with a rank weight of 10 will receive a higher rank than a student with a rank weight of 1. For more information about how rank is determined, see "Understanding Rank Method" on page 105.</p>

- 4 In the Forms section, modify information about received forms, as required.
- 5 To track additional forms, from the Actions menu, click Add Row > Form. Enter the necessary information.
- 6 Click OK.

# Deleting Applicants

You can delete applicants from queues, as required. For individual students you can delete their application from their Program Profile page, which removes all record of their application to that program.

When you delete applicants from a program, you can either retain the application record as part of the student's program profile or remove the application record from the student's history so there is no record that the student applied for the program.

## Note

Once an applicant is deleted, their queue status is set to "Deleted" and you cannot reactivate their application.

You may want to delete applicants from age or grade related programs that are copied to the planning calendar when the planning calendar is created. For example, an Early Childhood Education program for three-year-olds is created in the planning calendar when the planning calendar is created. Since the students in the program's list of applicants would be four years old in the next school year, they no longer qualify for the program.

## TO DELETE APPLICANTS FROM PROGRAM QUEUES:

- 1 Log on as a district or school administrator.
- 2 Do one of the following:

To	Do this
Work with students	<ol style="list-style-type: none"> <li>1 Open a student record.</li> <li>2 In the control bar, click Program Profile.</li> <li>3 On the Program Profile page, under Applications, select the program you want to work with.</li> <li>4 From the Actions menu, click Delete Application</li> <li>5 Skip the remaining steps.</li> </ol>
Work with programs	<ol style="list-style-type: none"> <li>1 In the control bar, under Programs, click Manage Programs.</li> <li>2 On the Program Search page, search for the program.</li> <li>3 In the # Applicants column, click the number that corresponds to the program session.</li> <li>4 On the Program Queues page, in the # Applicants column, click the number that corresponds to the queue.</li> <li>5 On the Manage Applicants page, select the students you want to delete from the queue.</li> <li>6 From the Actions menu, click Delete Applicants.</li> </ol>

- 3 If you are working with programs, on the Delete Applicants page, select one of the following options:

Option	Description
Delete applicants from queue but retain in history	Removes the selected students from this queue but keeps a record of their application. You can view the applications on the students' Program Profile page.
Delete applicants from queue and history	Removes all record of the selected students' application.

- 4 Click OK.

## Moving or Copying Program Applicants

You can move or copy applicants to other queues. If you move applicants, their application is removed from the original queue and, if you copy applicants, their application remains in the original queue and is added to the new queue.

When applicants are copied, their calculated queue status, program eligibility status, and rank are cleared in the new queue.

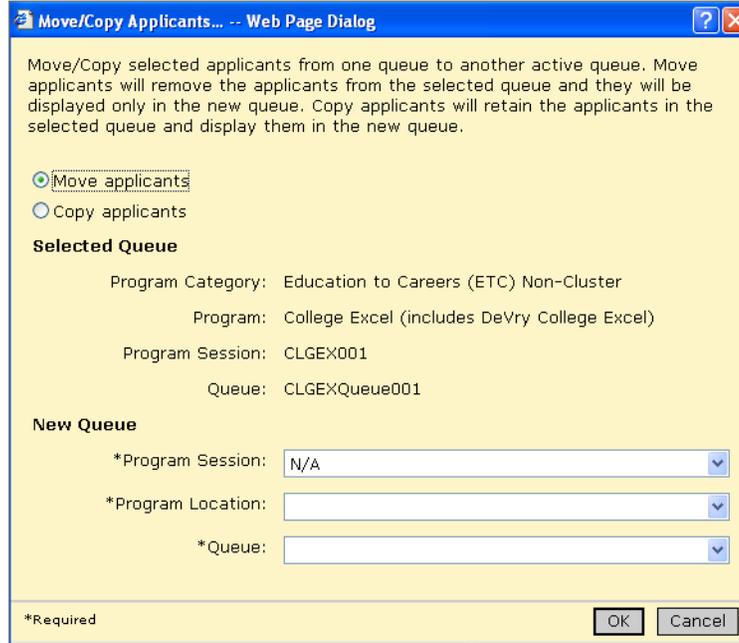
### Note

If students are already entered as applicants in the new queue, they are not moved or copied.

### To MOVE OR COPY APPLICANTS:

- 1 Log on as a district or school administrator.
- 2 In the control bar, under Programs, click Manage Programs.
- 3 On the Program Search page, search for the program.
- 4 In the # Applicants column, click the number that corresponds to the program session.
- 5 On the Program Queues page, in the # Applicants column, click the number that corresponds to the queue.
- 6 On the Manage Applicants page, select the students you want to move or copy to another queue.
- 7 From the Actions menu, click Move/Copy Applicants.

The Move/Copy Applicants page opens.



- 8 On the Move/Copy Applicants page, enter the following information, as required:

Field	Description
Move Applicants	Select this option to remove the selected applicants from the original queue when they are copied to the new queue.
Copy Applicants	Select this option to retain the selected applicants in the original queue when they are added to the new queue.
Program Session	Select the session for the queue you want to add the student to.  <b>Note</b> If you have permission to apply students to other locations, this list includes all sessions defined for this program in the district. If you log on as a school administrator and do not have permission to apply students to other locations, this list only contains sessions defined for your school. If you log on as a district administrator and do not have permission to apply students to other locations, this list only contains sessions defined for the school assigned to the original queue.
Program Location	This field is available only if you have permission to apply students to other locations.  Select the location for the queue you want to add the student to.
Queue	Select the queue you want to add the selected students to.  The list contains queues active for the selected program session.

- 9 Click OK.

# Working with Student Data to Support Eligibility Rules

Eligibility rules for queues and programs consider specific information about students to determine whether the student is eligible for the queue or program. Before you calculate eligibility criteria, make sure the relevant student data is up-to-date in the students' records.

Generally, you enter the required information when you register students in the district and enroll them in schools. The following sections highlight specific fields that are relevant to typical eligibility rules.

- On the Student Demographics page, enter information to support eligibility rules related to ECE, ELL, Migrant, and Special Services programs. See “Entering Student Demographics Data” on page 144.
- On the Student Demographics page, enter information to support eligibility rules related to Transportation programs. See “Entering Transportation Data” on page 146.
- On the Background Data page, enter information to support eligibility rules related to programs such as ECE, Free & Reduced Meals, and Homeless. See “Entering Student Background Data” on page 147.
- If your district uses Family Management, on the Family Overview page, enter information to support eligibility rules related to families such as sibling in program. See “Entering Family Management Data” on page 149.

For more information about working with student records, see the Chancery SMS District User and School User guides.

## Entering Student Demographics Data

Enter information on the Student Demographics page to support eligibility rules for programs.

- 1 Log on as a district or school administrator.
- 2 Open a student record.

- 3 On the Student Demographics page, click the Overview tab and enter the following information:

Field	Description
Receives specialized services	Indicate whether the student is receiving specialized (SPED) services.
Lunch status	Select the lunch program the student is eligible for.
Permission to share lunch eligibility	Indicate whether the parent/guardian has given permission for their child's school lunch eligibility to be shared with administrators.

- 4 Click the Personal Info tab and enter the following information:

Field	Description
Citizenship Status	Select the student's citizenship status.
Country of Citizenship	Select the student's country of citizenship.
Immigrant Student	Indicate if the student is an immigrant.
Date Entered Country	Enter the date the student entered your country.
Year Started School	Enter the date the student first began attending school in the current country.  <b>Note</b> Depending on your district's setup, either enter the month, day and year or the year only.
First Date Enrolled US School	Enter the date the student first enrolled in a school in the United States.

- 5 Click the Federal Info tab and enter the following information:

Field	Description
<b>Federal Race &amp; Ethnicity Information</b>	
Ethnic category	Select the student's primary Ethnic Category.
<b>Migrant &amp; Immigrant Information</b>	
Immigrated from	Select the country from which the student moved from when immigrating to the current country.
Migrant status	Indicate whether the student, or student's parent/guardian, maintains primary employment in one or more agricultural or fishing activities on a seasonal or temporary basis.
<b>Home Language Survey</b>	
Is a language other than English spoken at home?	Select Yes or No.  This value is used to identify students who might require services in an English Language Learners program.
Does the student speak a language other than English?	Select Yes or No.  This value is used to identify students who might require services in an English Language Learners program.

Field	Description
Survey Date	Select the date the home language survey was completed.
<b>Languages</b>	
Home language	Select the language or dialect routinely spoken in the student's home. This language or dialect might not be the student's native language.
Dominant language	Select the language or dialect the student best understands and is most comfortable with.
Native language	Select the language or dialect first learned by the student or first used by the parent/guardian with the student. Also referred to as Primary Language.
Other language	Select any other language or dialect, other than the dominant language, in which the student is proficient.

6 Click Save.

## Entering Transportation Data

Transportation data can be used to determine if students qualify for transportation programs that transport them to schools or programs they are enrolled in, as well as to determine their eligibility for specific programs based on their school proximity.

Transportation programs use the Distance From School and “Home address is in school's area” fields to determine if students are eligible for transportation programs defined for schools and programs. These values are usually set on the Add Status Code page when you enroll the student in a school. At the school, you can also edit these values on the Student Demographics page. To determine if students are eligible for transportation programs, the students must be enrolled in the school.

If you want to determine if students are eligible for programs based on their distance from the program, you can define an eligibility rule based on school proximity. To use the school proximity eligibility function, you must specify the student's Miles From School value when applying for programs. You can determine the student's proximity to the school based on their application to a program rather than their enrollment in a school.

**To EDIT INFORMATION FOR TRANSPORTATION PROGRAMS AT THE SCHOOL:**

- 1 Log on as a school administrator.
- 2 Open a student record.

Quick Search > Student Search Results > Student Demographics

Actions Edit Reports Help

Smith, Jane 10190051

**Jane Smith** Edit ^

No thumbnail photo is available

Preferred name:  
 Current age: 15  
 Current grade: 9  
 Homeroom: N/A  
 Ethnic category: N/A  
 Home language: N/A  
 Home school: Arlington High School

Placement classification:  (0-9)  
 Student promotion status: Pending  
 Graduation plan: None  
 Distance from school:  (miles)

Student address is in school's area  
 Upload to K12Planet

- 3 On the Student Demographics page, on the School Specific tab, enter the following information:

Field	Description
Distance from School	Enter the number of miles between the student's residence (home address) and the student's home school.
Home address is in school's area	Indicate whether the student's residence meets any boundary conditions for the home school, such as physical area borders or zone.

- 4 Click OK.

## Entering Student Background Data

- 1 Log on as a district or school administrator.
- 2 Open a student record.
- 3 In the control bar, under Program, click Background Data.

The Edit Background Data page opens.

- 4 On the Edit Background Data page, to support applications to various programs, make sure you enter the following:

Field	Description
Food stamp case number	Enter the identification number given to a family when they are eligible to receive food stamps.
TANF Number	Enter the identification number given to a family when they are homeless (Temporary Assistance to Needy Families).
FSDIR number	Enter the identification number given to a family when they are identified as native peoples living on an official reservation (Food Distribution Program on Indian Reservations).
Other case number	Enter an identification number given to a family for other purposes that may have a Free & Reduced Meals connection, such as a Medicare number.
Household annual income	Indicate the total amount of money a student’s family earns in a single calendar year.
Household size	Indicate the number of adults and children in a student’s family who are living in the same house.

Field	Description
USDA income guidelines	Indicate whether the household size qualifies the student for free or reduced meals. Choose from: <ul style="list-style-type: none"> <li>meets income; free meals</li> <li>meets income; reduced meals</li> </ul>
Student is a foster child	Indicate whether the child is officially a foster child.
Lives in Title 1 area	Indicate whether the student's home address is in a Title 1 area.
Lives in low income area	Indicate whether the student's home address is officially considered to be in a low-income neighborhood.
Minor/adult status	Specify the student's status in relation to legal adulthood as specified by state law.
Lacks nighttime residence	Indicate whether the student lacks a fixed, regular, or adequate nighttime residence and has a primary residence that is a shelter of some type; an institution that provides temporary residence; or some other place not designed for regular sleeping accommodations for human beings.
Child of another student	Indicate whether the student is the child of a student already enrolled in the district.

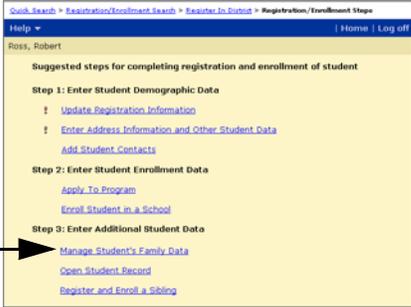
5 Click OK.

## Entering Family Management Data

If your district uses Family Management, you can enter information about students' families. You can then use this information to determine if students are eligible for sibling queues. For more information about setting up sibling queues, see "Eligibility Criteria for Sibling Queue" on page 110.

**TO WORK WITH FAMILY MANAGEMENT INFORMATION:**

- 1 Log on as a district or school administrator.
- 2 Do one of the following:

To	Do this
Work with family information while registering and enrolling students	<ol style="list-style-type: none"> <li>1 From the Actions menu, click Register/Enroll Students.</li> <li>2 On the Registration/Enrollment Search page, search for the student you want to work with.</li> <li>3 From the Search Results, in the Student Name column, click the student's name.</li> <li>4 On the Registration Enrollment Steps page, click Manage Students Family Data.</li> </ol> 
Work with family information while working with a student record	<ol style="list-style-type: none"> <li>1 Open a student record.</li> <li>2 In the control bar, click Family.</li> </ol>

- 3 From the Family Overview page, you can complete the following tasks:

To	Do this
Edit the family record	<ul style="list-style-type: none"> <li>• In the header, click Edit.</li> </ul>
Edit a contact or student record	<ul style="list-style-type: none"> <li>• Click the contact's or student's name.</li> </ul>
Add a new student to the selected Family	<ol style="list-style-type: none"> <li>1 In the header, click Edit.</li> <li>2 In the Family Overview dialog, in the Students panel, click Add New.</li> </ol>
Add an existing Student to the selected Family	<ol style="list-style-type: none"> <li>1 In the header, click Edit.</li> <li>2 In the Family Overview dialog, in the Students panel, click Add Existing.</li> </ol>
Remove a Student from the selected Family	<ol style="list-style-type: none"> <li>1 In the header, click Edit.</li> <li>2 In the Family Overview dialog, in the Students panel, click Remove. The Remove button won't appear if there is only one student in the Family.</li> </ol>
Add a new Contact to the selected Family	<ol style="list-style-type: none"> <li>1 In the header, click Edit.</li> <li>2 In the Family Overview dialog, in the Contacts panel, click Add.</li> </ol>

To	Do this
Delete a Contact from the selected Family	<ol style="list-style-type: none"> <li>1 In the header, click Edit.</li> <li>2 In the Family Overview dialog, in the Contacts panel, click Delete.</li> </ol>
Change student-contact relationships within the selected Family	<ol style="list-style-type: none"> <li>1 In the header, click Edit.</li> <li>2 In the Family Overview dialog, in the contacts panel, click Edit Relationships.</li> </ol>

For more information about Family Management, see the Chancery SMS District User Guide.

## Calculating Student Eligibility

To determine whether students are eligible and can be assigned to a program, you must calculate their queue status, program eligibility, and rank. Students can only be assigned to the program if their queue status is “Offered” and their program eligibility is “Eligible”. Students can only be offered a position in a program if they have the highest rank of all students in the queue.

You can calculate the student’s eligibility when you enter the student’s program application, or you can enter multiple applications and calculate eligibility all at once.

### Note

If a student is not eligible for a program because they do not meet the queue or program criteria, another student has a higher rank, or the program is at capacity for the queue, and you have the required permissions, you can override the criteria and assign the student to a program.

To determine if a student is eligible for a program and determine their priority for placement, calculate the following values:

- Queue Status. See page 151.
- Eligibility Status. See page 153.
- Rank. See page 156.

## Calculating Queue Status

Each program session has at least one queue. The queue can be “open” so any student can be added to the queue or it can be restrictive and have criteria that students must meet before they can be added to the queue. For example, a program session may have a General queue that any student can belong to, as well as a sibling queue that offers additional positions to siblings of program participants. Students can belong to more than one queue for a single program session.

If the queue is open, i.e., it does not have any eligibility criteria, the student's queue status is automatically set to "Offered" and you do not need to calculate queue status or rank.

If the queue is restrictive, i.e., it has either eligibility rules or capacity limits, the student's queue status is set to "New" and you must calculate their queue status before you can offer students a position in the program. When you calculate queue status, the student's status is set to "Waiting" if the student meets the criteria for the queue eligibility rules or "Denied" if they do not meet the criteria. You can calculate rank for any student whose queue status is set to "Waiting". For more information, see "Calculating Rank" on page 156.

For more information about setting up queue criteria, see "Examples of Queue Eligibility Criteria" on page 109.

**TO CALCULATE QUEUE STATUS:**

- 1 Log on as a district or school administrator.
- 2 In the control bar, under Programs, click Manage Programs.
- 3 On the Program Search page, search for and select the program session you want to calculate queue status for.
- 4 From the Actions menu, click Manage Queues & Applicants.
- 5 On the Program Queues page, in the # Applicants column, click the number that corresponds to the queue you want to work with.

The Manage Applicants page opens.

The queue status column shows the current status for each applicant in the queue. If the queue does not have any eligibility criteria, the participants status is automatically set to "Offered".

The screenshot shows the 'Manage Applicants' page. At the top, there's a navigation bar with 'Program Search > Program Queues > Manage Applicants'. Below that is a control bar with 'Actions', 'Edit', and 'Help' menus. The main content area is divided into sections: 'Queue: General', 'Program Information', 'Eligibility Calculations', and 'Applicants'.

**Program Information:**

- Program category: Free & Reduced Meals
- Program: Free and Reduced Lunch
- Program session: Free and Reduced Lunch
- Location: Chancery High
- Capacity: Unlimited
- # spaces taken: 1
- # spaces available: [empty]
- % full: 0.0%

**Eligibility Calculations:**

Selected: 0 Total: 2

<input type="checkbox"/>	Rule Name	Rule Description	Rule Start Date	Rule End Date
<input type="checkbox"/>	Free and reduced Rule	income/size/FSDIR/TANF	9/1/2004	6/30/2010
<input type="checkbox"/>	PM TEST	tanif starts with 1 income<30000		

Select one rule above and one or more students below, then from the Action menu, click Calculate Eligibility.

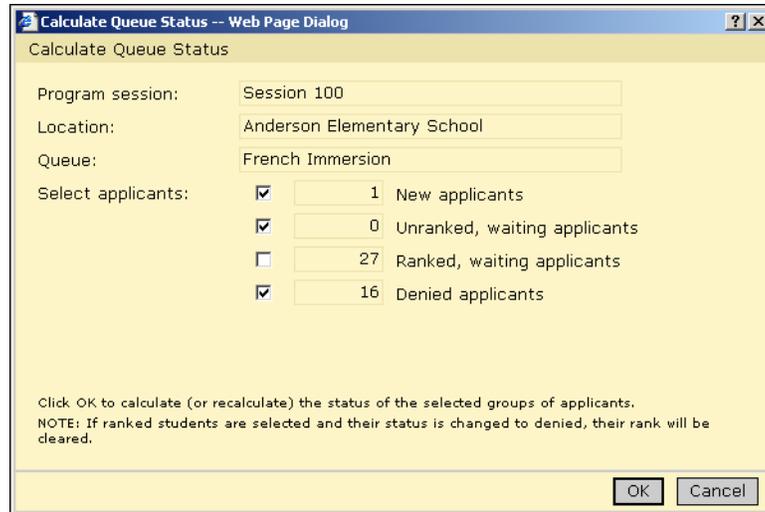
**Applicants:**

All [dropdown] Selected: 0 Total: 1

<input type="checkbox"/>	Name	Rank Weight	Rank	Eligibility Status	Eligibility Last Run	Queue Status	Other Queues	Std Pref
<input type="checkbox"/>	Buchanan, Diana Y		1	Not Calculated		Offered		

- On the Manage Applicants page, from the Actions menu, click Calculate Status.

The Calculate Queue Status page opens.



- In the Calculate Queue Status dialog, for Select Applicants, select any of the following options:

Option	Descriptions
New Applicants	Includes applicants whose status is set to “New”.
Unranked, Waiting Applicants	Includes applicants whose status is “Waiting” and who have not yet been assigned a rank in the queue.
Ranked, Waiting Applicants	Includes applicants whose status is “Waiting” and who have been assigned a rank in the queue. <b>Note</b> If you calculate the queue status for applicants who have already been assigned a rank and their queue status changes to “Denied”, then their rank is cleared.
Denied Applicants	Includes applicants whose status is “Denied”.

- Click OK.

## Calculating Program Eligibility

Calculate program eligibility to determine if students meet the eligibility criteria defined for the program. If a student is eligible for a program and their queue status is set to “Offered”, you can assign them to the program. For more information about assigning students to programs, see “Assigning Students to Programs” on page 137.

If a student is not eligible for the program and you have permission, you can override their eligibility status to assign them to the program. For more information, see “Overriding Eligibility Criteria” on page 159.

**Note**

You can use eligibility rules for programs in both the active and planning calendars. However, some eligibility functions and parameters may produce different results when used in the planning calendar. For example, since grades are not entered in the planning calendar, grading functions evaluate based on the active calendar. For more information, see the Chancery SMS Understanding Eligibility Rules Technical Bulletin.

Only rules that are active for the queue are available. For example, if a rule has an end date that is in the past, the rule does not appear in the list of eligibility rules.

**Note**

Prior to calculating eligibility, make sure the student record is up-to-date with any information that will be used to calculate eligibility. For more information, see “Working with Student Data to Support Eligibility Rules” on page 144.

**TO CALCULATE QUEUE ELIGIBILITY:**

- 1 Log on as a district or school administrator.
- 2 In the control bar, under Programs, click Manage Programs.
- 3 On the Program Search page, search for and select the program session you want to calculate queue status for.
- 4 From the Actions menu, click Manage Queues & Applicants.
- 5 On the Program Queues page, in the # Applicants column, click the number that corresponds to the queue you want to work with.

The Manage Applicants page opens.

The Eligibility Status column shows the current program status for each applicant in the queue. If the program does not have any eligibility criteria, the participants status is automatically set to "Eligible".

The screenshot shows the 'Manage Applicants' page for a 'General' queue. It includes sections for 'Program Information' and 'Eligibility Calculations'. The 'Eligibility Calculations' section shows two rules: 'Free and reduced Rule' and 'PM TEST'. Below this is a table of applicants, with one applicant 'Buchanan, Diana Y' listed. An arrow points from the text on the left to the 'Eligibility Status' column in the applicants table.

Rule Name	Rule Description	Rule Start Date	Rule End Date
<input type="checkbox"/> Free and reduced Rule	income/size/FSDIR/TANF	9/1/2004	6/30/2010
<input type="checkbox"/> PM TEST	tanif starts with 1 income<30000		

Name	Rank Weight	Rank	Eligibility Status	Eligibility Last Run	Queue Status	Other Queues	Std Pref
<input type="checkbox"/> Buchanan, Diana Y		1	Not Calculated		Offered		

- On the Manage Applicants page, under Eligibility Calculations, select the applicable eligibility rules.

**Note**

In the active calendar, the Manage Applicants page only displays current eligibility rules. If the current date is past the end date specified for the eligibility rule, the rule is not available on the Manage Applicants page. In the planning calendar, the Manage Applicants page only displays eligibility rules if their rule dates fall within the dates set for the planning calendar. If an eligibility rule has an end date set for the last day of the current active calendar, that eligibility rule is not available on the Manage Applicants page in the planning calendar.

This close-up shows the 'Eligibility Calculations' section where the 'Free and reduced Rule' is selected with a checkmark. The 'PM TEST' rule is unselected.

Rule Name	Rule Description	Rule Start Date	Rule End Date
<input checked="" type="checkbox"/> Free and reduced Rule	income/size/FSDIR/TANF	9/1/2004	6/30/2010
<input type="checkbox"/> PM TEST	tanif starts with 1 income<30000		

- Under Applicants, select one or more students that you want to determine eligibility for.

<input type="checkbox"/>	Name	Rank Weight	Rank	Eligibility Status	Eligibility Last Run	Queue Status	Other Queues	Stdt Pref
<input checked="" type="checkbox"/>	Dabresil, Robert A			Ineligible	10/06/2005	Offered		
<input type="checkbox"/>	Daisy, Angel			Eligible	10/06/2005	Offered		
<input checked="" type="checkbox"/>	Damier, Jamaul			Ineligible	10/06/2005	Offered		
<input type="checkbox"/>	Dagu, Krystal			Eligible	10/06/2005	Offered		
<input checked="" type="checkbox"/>	Datko, Terence H			Ineligible	10/06/2005	Offered		
<input type="checkbox"/>	Davies, Kim K			Eligible	10/06/2005	Offered		

- From the Actions menu, click Calculate Eligibility.

## Calculating Rank

Rank determines the priority that applicants can be offered positions in a program.

### Note

If the queue has no eligibility rules and no capacity limits, students are automatically offered a position in the program and you do not need to calculate their rank.

When you calculate rank, the rank assigned to each applicant is determined by the rank method specified for the queue and whether rank weights are considered. For more information about how rank is determined, see “Understanding Rank Method” on page 105.

Before you offer applicants a position in a program, calculate their rank.

### Note

Ranks can be calculated for all students who have a queue status set to “Waiting” regardless of the program eligibility status. However, students cannot be assigned to the program unless their both their program eligibility status is set to “Eligible” and their queue status is set to “Offered”. If an ineligible student has a higher rank than an eligible student, you may not be able to assign students to the program unless you first remove the ineligible student’s application or rank. For more information, see “Removing Ineligible Students from Ranking” on page 158.

### TO CALCULATE RANK:

- Log on as a district or school administrator.
- In the control bar, under Programs, click Manage Programs.
- On the Program Search page, search for and select the program session you want to calculate queue status for.
- From the Actions menu, click Manage Queues & Applicants.

- On the Program Queues page, in the # Applicants column, click the number that corresponds to the queue you want to work with.

The Manage Applicants page opens.

The screenshot shows the 'Manage Applicants' page. At the top, there's a breadcrumb trail: 'Program Search > Program Queues > Manage Applicants'. Below that are navigation options: 'Actions', 'Edit', and 'Help'. The page is titled 'Queue: General'.

**Program Information:**

- Program category: Free & Reduced Meals
- Program: Free and Reduced Lunch
- Program session: Free and Reduced Lunch
- Location: Chancery High
- Capacity: Unlimited
- # spaces taken: 1
- # spaces available: [empty]
- % full: 0.0%

**Eligibility Calculations:**

Selected: 0 Total: 2

Rule Name	Rule Description	Rule Start Date	Rule End Date
<input type="checkbox"/> Free and reduced Rule	income/size/FSDIR/TANF	9/1/2004	6/30/2010
<input type="checkbox"/> PM TEST	tanif starts with 1 income<30000		

Select one rule above and one or more students below, then from the Action menu, click Calculate Eligibility.

**Applicants:**

All [dropdown] Selected: 0 Total: 1

Name	Rank Weight	Rank	Eligibility Status	Eligibility Last Run	Queue Status	Other Queues	Std Pref
<input type="checkbox"/> Buchanan, Diana Y		1	Not Calculated		Offered		

The Rank column shows the rank assigned to each applicant in the queue.

The Rank Weight column shows the rank weight entered on the students application for the program. If rank weights are considered, applicants are sorted by rank weight before being assigned a rank.

- On the Manage Applicants page, from the Actions menu, click Calculate Rank.

The Calculate Rank page opens.

The screenshot shows the 'Calculate Ranks -- Web Page Dialog' window. It contains the following fields and options:

- Program session: Session 100
- Location: Anderson Elementary School
- Queue: French Immersion
- # Applicants: 27 Ranked, waiting & eligible applicants; 0 Unranked, waiting & eligible applicants
- Select applicants:
  - Unranked only (leave existing ranks locked-in)
  - All waiting, eligible applicants (re-rank together)
- Rank method: Random
- Use rank weight: No

Click OK to calculate (or recalculate) the rank of the selected groups of applicants. If re-ranking, students with ranks that have been overridden will be left with their overridden value.

Buttons: OK, Cancel

- 7 On the Calculate Ranks page, under Select Applicants, choose one of the following options:

Option	Description
Unranked only	Calculates the ranks for all students who currently do not have a rank. Students who have already been ranked are left as is, that is, their place in the queue does not change. New students are ranked after the existing students.
All waiting applicants	Recalculates the rank for all students. As a result, the ranks of existing students may change.

**Note**

When calculating ranks, students with overridden ranks do not lose their place.

- 8 Click OK.

## Removing Ineligible Students from Ranking

Students are assigned a queue rank regardless of their program eligibility status. So, students who do not meet the eligibility criteria specified for the program can receive a rank and be offered a position in the program. However, when you are ready to assign students to the program, you will be unable to assign a student who is not eligible for the program. And, unless you have permission to override rank, you cannot assign a student to the program if another student has a higher rank than they do, even if the higher ranking student is ineligible for the program.

To continue processing the students in the queue, you must remove the ineligible students from the ranking. You can do this in one of two ways:

- Delete the student’s application. This option removes the student’s application from the queue. For more information, see “Deleting Applicants” on page 141.
- Reset the student’s queue status and rank. This option retains the student’s application in the queue, sets their queue status to “New” and resets their rank.

**TO RESET QUEUE STATUS:**

- 1 Log on as a district or school administrator.
- 2 In the control bar, click Manage Programs.

- 3 On the Manage Programs page, in the # Applicants column, click the number corresponding to the program session you want to work with.

### Note

To easily find ineligible students, under Applicants, click the Eligibility Status column heading to sort applicants by their eligibility status.

- 4 Select the students whose rank and queue status you want to reset.

<input type="checkbox"/>	Name	Rank Weight	Rank	Eligibility Status	Eligibility Last Run	Queue Status	Other Queues	Std. Pref
<input checked="" type="checkbox"/>	Dabresil, Robert A			Ineligible	10/06/2005	Offered		
<input type="checkbox"/>	Daisy, Angel			Eligible	10/06/2005	Offered		
<input checked="" type="checkbox"/>	Damier, Jamaul			Ineligible	10/06/2005	Offered		
<input type="checkbox"/>	Daou, Krystal			Eligible	10/06/2005	Offered		
<input checked="" type="checkbox"/>	Datko, Terence H			Ineligible	10/06/2005	Offered		
<input type="checkbox"/>	Davies, Kim K			Eligible	10/06/2005	Offered		

- 5 From the Actions menu, click Reset to New.
- 6 Click OK.

## Overriding Eligibility Criteria

After calculating eligibility, you may not be able to assign a student to a program for any of the following reasons:

- they do not meet the specified program eligibility criteria
- the program is full
- they have a lower rank than other applicants
- they do not meet the specified queue eligibility criteria

If you have permission to override eligibility, you may be able to override the status and enroll the student in the program. For example, the student might not meet the attendance or test score criteria for a program. However, in special circumstances, such as personal hardship, you might decide that a student should still be placed in the program. For information about permissions, see “Permissions to Apply to Programs and Enroll in Schools” on page 114.

### TO OVERRIDE ELIGIBILITY AND ASSIGN STUDENTS TO PROGRAMS:

- 1 Log on as a district or school administrator.
- 2 In the control bar, under Programs, click Manage Programs.
- 3 On the Program Search page, search for and select the program session you want to calculate queue status for.

- 4 From the Actions menu, click Manage Queues & Applicants.
- 5 On the Program Queues page, in the # Applicants column, click the number that corresponds to the queue you want to work with.
- 6 On the Manage Applicants page, select the student you want to assign to the program.
- 7 From the Actions menu, click Assign to Program.

The Assign to Program page opens.

Enter the effective date for the student assignment to this program.

\*Effective Date:  Today  
 Tomorrow  
 Specify:  mm/dd/yyyy

The student that you selected cannot be assigned to the program for one of the following reasons:

Student's queue status is not 'Offered'  
 Student is not ranked and the higher ranked student is not 'Offered'  
 Capacity of program indicates that seats are not available  
 Student's program eligibility status is not 'Eligible'

To continue with the program assignment, enter an override reason for the ineligible student(s) and then click 'OK', otherwise click 'Cancel'. Selecting 'Cancel' will not assign any of the pre-selected students to the program.

\*Override reason:   
 Override by:   
 Additional details:

\*Required

These fields only appear if the student has not met the eligibility requirements for participating in this program and you have permission to override the eligibility criteria.

- 8 On the Assign to Program page, enter the following information and click OK.

Field	Description
Effective Date	Specify the date the student will be assigned to the program.
Override Reason	Select the reason you are overriding eligibility criteria to enroll this applicant in the program.
Overridden By	Enter your name.
Additional Details	Enter any additional information.

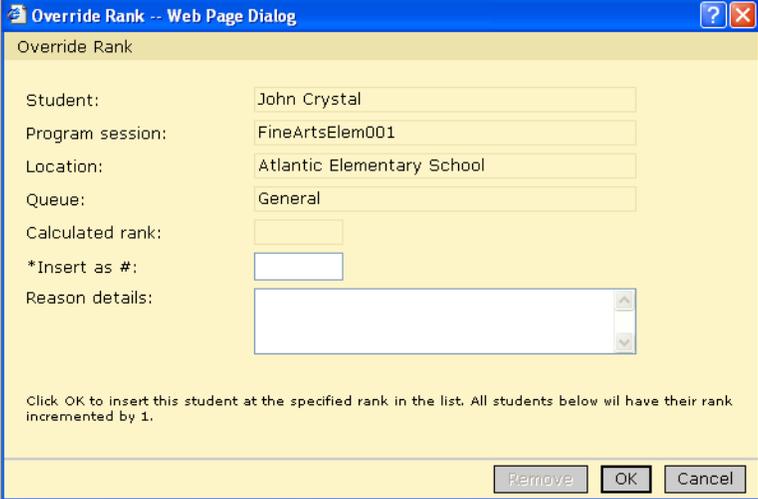
## Assigning Specific Ranks

When you calculate ranks, applicants are assigned ranks based on the rank method and rank weights defined for the queue. If you have permission, you can override calculated ranks and assign a specific rank to a student in the queue. Subsequent student ranks are adjusted to accommodate the change. For more information about permissions, see “Permissions to Apply to Programs and Enroll in Schools” on page 114.

### TO OVERRIDE CALCULATED RANKS:

- 1 Log on as a district or school administrator.
- 2 In the control bar, under Programs, click Manage Programs.
- 3 On the Program Search page, search for and select the program session you want to assign ranks for.
- 4 From the Actions menu, click Manage Queues & Applicants.
- 5 On the Program Queues page, in the # Applicants column, click the number that corresponds to the queue you want to work with.
- 6 On the Manage Applicants page, select the student you want to assign a rank.
- 7 From the Actions menu, click Override Rank.

The Override Rank page opens.



Override Rank

Student: John Crystal

Program session: FineArtsElem001

Location: Atlantic Elementary School

Queue: General

Calculated rank:

\*Insert as #:

Reason details:

Click OK to insert this student at the specified rank in the list. All students below will have their rank incremented by 1.

Remove OK Cancel

- 8 On the Override Rank page, enter the following information, as required:

Field	Description
Insert as #	Specify the rank number you want to assign to this student. For example, if you want them to be offered a position first, enter 1.
Reason Code	Select the reason you are overriding the rank for this student.  Depending on the district preference, a reason code may be required when you override student rank. For more information, see “Setting Program Management District Preferences” on page 22.
Reason Details	Enter any additional details about the reason for overriding the rank for this student.

- 9 Click OK.

## Creating Saved Lists of Program Applicants

You can save a list of program applicants and retrieve that list from other parts of Chancery SMS. For example, you can save a list of students who have applied to a program and then retrieve that list to schedule those students into a specific class.

### TO CREATE A SAVE LISTS OF PROGRAM APPLICANTS:

- 1 Log on as a school or district administrator.
- 2 In the control bar, click Manage Programs.
- 3 On the Manage Programs page, perform a Basic or Detail Program search.
- 4 In the Search Results, select a program session.
- 5 From the Actions menu, click Manage Queues & Applicants.
- 6 On the Manage Queues page, in the # Applicants column, click the number corresponding to the queue you want to create the saved list from.
- 7 On the Manage Applicants page, under Applicants, select one or more students.
- 8 From the Actions menu, click Add to List.

The Save to List page opens.

Program Search > Program Queues > Manage Applicants > Save To List

Help | Home | Log off

**3 students selected**

Create New List

\*List name:

Description:

Add to Existing List

List name:

To access a saved list, go to the Student Search page.

\*Required

- 9 On the Save to List page, select Create New List, and enter an appropriate list name and description.

OR

If other saved lists exist that you want to replace the students in the existing list, select Add to Existing List, and then select a list from the List Name dropdown.

- 10 Click OK.

The Saved List is accessible from your Home page.



# MANAGING PARTICIPANTS

A participant is a student who is active in the program. When you manage participants, you can review program attendance, remove, move, or copy participants from programs, and enter additional information about participants for specific program categories.

Participants can be managed at the program level or at the student level.

For information about managing applicants and participants at the program level, see “Using the Manage Participants Page” on page 165.

For information about managing applications and program placement from the student record, see “Viewing Student Program Information” on page 169.

## Permissions to Manage Participants

The following table lists key tasks and the corresponding permissions associated with managing program participants:

To	You need this permission	Set to
Remove students from programs (program level)	Program Category - <i>Category Name</i> > Manage Participants	Delete
	Program Category - <i>Category Name</i> > Remove from Program	Yes
Remove students from programs (student record)	Students > Demographic Data	Edit
	Program Category - <i>Category Name</i> > Manage Participants	Delete
	Enrollment/Program Queues > Program Queue - Applicants	Edit
	Program Category - <i>Category Name</i> > Remove from Program	Yes

By default, district and school administrators can manage program participants.

## Using the Manage Participants Page

The Manage Participants page provides an overview of the students who are participating in a program and allows you to work with existing participants.

While you are working with the Manage Programs page, you can open a Program Setup Summary page to see the program setup details for that session.

**TO VIEW PROGRAM SETUP DETAILS:**

- 1 Log on as a district or school administrator.
- 2 In the control bar, click Manage Programs.
- 3 On the Manage Programs page, search for a program.
- 4 In the Search Results, in the # Participants column, click the number that corresponds to the program session you want to manage participants for.

Location	Start Date	End Date	Student Capacity	# of Participants	# of Applicants
<a href="#">Math Tutoring Secondary-Do Not Modify</a> MathTutSec001				32	
<input type="checkbox"/> Oceanview High School	08/15/2005	07/15/2006	0	2	38
<input type="checkbox"/> Sir John A MacDonald High School	08/15/2005	07/15/2006	0		
<a href="#">Migrant Status Secondary</a> MigStatS001					
<input type="checkbox"/> Crystal High School	08/15/2004	07/15/2005	0		
<input type="checkbox"/> Oceanview High School	08/15/2004	07/15/2005	0		

To open the Manage Participants page, click the number that corresponds to the program session.

The Manage Participants page opens.

Program Information

Program category: After School Athletics  
 Program: Baseball Secondary  
 Program session: S1  
 Planning calendar option:  Create session/roll students as participants  
 Roll existing applicants  
 Planning calendar Requested School controlled by Program Management

Eligibility Calculations

Rule Name	Rule Description	Rule Start Date	Rule End Date
<input type="checkbox"/> Gender M	Gender m	03/21/2006	04/07/2006

To re-calculate eligibility, select one rule above and one or more students below, then select 'Calculate Eligibility' from the Actions menu.

Participating Students

Student Name	Entry Date	ID	Eligibility Last Run	Eligibility Rule Name	Eligibility Status	Exit Date
<a href="#">Jones, Robert</a>	08/16/2005	000291	04/19/2006	Gender M	Eligible	
<a href="#">Martinez, Mary</a>	08/16/2005	000292	04/19/2006	Gender M	Ineligible	

Shows any eligibility rules defined for the program.

To open the Program Profile page for a participant, click the student's name.

A tilde in this column indicates the student's eligibility criteria was overridden when they were added to the program.

To see the student's eligibility summary, click the student's status.

The Manage Participants page shows the following information:

**Note**

Use Edit > Choose Columns to change the information displayed on this page.

Field	Description
Program Category	Displays the program category.
Program	Displays the program description.
Program Session	Displays the program session description.
Planning Calendar Option	Displays how the program is handled during next-year preparation.
Roll Existing Applicants	Displays whether applicants are copied to the planning calendar during Next-Year Preparation.
Planning Calendar Requested School Controlled by Program Management	Displays whether program management controls the Requested School field for the planning calendar.
Rule Name	Displays the rule name for eligibility rules defined for this program.  <b>Note</b> Rules are only available for sessions if they do not have start and end dates or if their start date is greater than the session start date and their end date is less than the session end date.
Rule Description	Displays the rule description for eligibility rules defined for this program.
Rule Start Date	Displays the date the rule starts.
Rule End Date	Displays the date the rule ends.
Student Name	Displays the participants name. Click the link to open the students Program Profile page.
Entry Date	Displays the date the student was assigned to the program session.
ID	Displays the participant’s district ID number.
Eligibility Last Run	Displays the date the student’s eligibility was last calculated.  If eligibility has not been calculated, this field is blank.
Eligibility Rule Name	Displays the name of the last eligibility rule run for the student.  If eligibility has not been calculated, this field is blank.

Field	Description
Eligibility Status	<p>Displays the student’s current eligibility status.</p> <p>The eligibility status may be set to:</p> <ul style="list-style-type: none"> <li>• Not calculated - Eligibility status has not been calculated</li> <li>• Eligible - Based on the last eligibility calculation, the student satisfied the criteria for entry into the program.</li> <li>• Ineligible - Based on the last eligibility calculation, the student did not satisfy the criteria for entry in to the program.</li> </ul>
Exit Date	Displays the date the student left the program.

## Displaying Past and Future Program Participants

By default, the Manage Participants page displays students who are currently participating in the program. If you want to see students who have participated in the program in the past, but who are not currently assigned to the program or students who are assigned to the program as of a future date, you can show past or future participants.

### Note

Past and future program participants are shown in italic type.

### TO SHOW OR HIDE PAST AND FUTURE PROGRAM PARTICIPANTS:

- 1 Log on as a district or school administrator.
- 2 In the control bar, click Manage Programs.
- 3 On the Manage Programs page, in the # Participants column, click the number corresponding to the program you want to work with.
- 4 On the Manage Participants page, from the Edit menu, choose one of the following options:

Option	Description
Show future participants	<p>Available if future participants are currently hidden.</p> <p>If you select this option, the list of participants will include students whose program session start date is past the current calendar end date.</p>
Show past participants	<p>Available if past participants are currently hidden.</p> <p>If you select this option, the list of participants will include students whose program session start date is prior to the current calendar start date.</p>

Option	Description
Hide future participants	Available if future participants are currently shown. If you select this option, the list of participants will not include students whose program session start date is past the current calendar end date.
Hide past participants	Available if past participants are currently shown. If you select this option, the list of participants will not include students whose program session start date is prior to the current calendar start date.

## Viewing Student Program Information

You can use the Student Program Profile page to view a summary of the programs the student currently has applications for or is currently participating in.

### TO VIEW A PROGRAM SUMMARY FOR STUDENTS:

- 1 Log on as a district or school administrator.
- 2 Open a student record.
- 3 In the control bar, click Program Profile.

The student’s Program Profile page displays the programs the student is currently active in and the programs the student has applied for.

Programs the student is currently active in

Programs the student has current applications for.

To view program details, click a program name.

Program category	Program	Session	Location	Queue	Preference	Queue Status	Eligibility Status
<input type="checkbox"/>	Alternate	Bayshore Session	Bayshore High School	General		Offered	Not Calculated
<input type="checkbox"/>	Theory of Knowledge	Theory of Knowledge	Anderson Elementary School	Limited		Waiting	Not Calculated

From the Program Profile page, access the Program Details page for each program the student has applied for or is active in. For detailed information about editing program details, see “Adding and Editing Student Program Details” on page 177.

## Displaying Students' Past and Future Programs

By default, the Program Profile page displays the programs students are currently participating in. If you want to include programs the student has participated in but is no longer a participant or programs the student is assigned to as of a future date, you can show past or future programs for the student.

### Note

If you choose to display past or future programs, you may want to show the program start and end date columns. To change the columns, from the Edit menu, click Choose Columns. Move the columns you want to display into the Selected Columns list. Click OK.

### TO DISPLAY PAST OR FUTURE PROGRAMS:

- 1 Log on as a district or school administrator.
- 2 Open a student record.
- 3 In the control bar, click Program Profile.
- 4 On the Program Profile page, from the Edit menu, choose one of the following options:

Option	Description
Show past programs	Available if past programs are currently hidden. If you select this option, the list of programs will include programs whose end dates are prior to the current calendar start date.
Show future programs	Available if future programs are currently hidden. If you select this option, the list of programs will include programs whose start dates are past the current calendar end date.
Hide past programs	Available if past programs are currently shown. If you select this option, the list of programs will not include programs whose end dates are prior to the current calendar start date.
Hide future programs	Available if future programs are currently shown. If you select this option, the list of programs will not include programs whose start dates are past the current calendar end date.

## Viewing an Eligibility Summary for Participants

Once eligibility is calculated for participants in a program, you can view a summary of the results of the last eligibility calculation, as well as the eligibility results that were current at the time the student was assigned to the program.

**TO VIEW AN ELIGIBILITY SUMMARY FOR PARTICIPANTS:**

- 1 Log on as a district or school administrator.
- 2 Do one of the following:

To	Do this
Use the Manage Participants page	<ol style="list-style-type: none"> <li>1 In the control bar, click Manage Programs.</li> <li>2 On the Program Search page, in the # Participants column, click the number corresponding to the program.</li> <li>3 On the Manage Participants page, in the Eligibility Status column, click the status corresponding to the student.</li> </ol>
Use the Program Profile page	<ol style="list-style-type: none"> <li>1 Open a student record.</li> <li>2 In the control bar, click Program Profile.</li> <li>3 On the Program Profile page, in the Programs panel, in the Eligibility Status column, click the status corresponding to the program.</li> </ol>
Use the Edit Program Details page	<ol style="list-style-type: none"> <li>1 Open a student record.</li> <li>2 In the control bar, click Program Profile.</li> <li>3 On the Program Profile page, select the program.</li> <li>4 From the Actions menu, click Edit Program Details.</li> <li>5 On the Edit Program Details page, from the Eligibility Status field, click the status.</li> </ol>

3 Review the student's eligibility summary.

The program information for the program the student's eligibility was calculated for.

The date the student was assigned to the program and the eligibility calculation and rules that were current on that date. Criteria the student did not meet is shown in bold, red text.

The date the student's eligibility was last calculated and the calculations and rules applied at that time. If the student's eligibility was recalculated after they were assigned to the program, this summary may be different from the Program Assignment Eligibility Summary.

The eligibility summary shows the following information:

Field	Description
Program Category	The program category this eligibility summary applies to.
Program	The program this eligibility summary applies to.
Program Session	The program session this eligibility summary applies to.
Participant Entry Date	The date the student was assigned to the program.
Rule Name	The rule that was used to calculate the student's eligibility prior to the student being assigned to the program.
Eligibility Status	The student's calculated status on the date they were assigned to the program.

Field	Description
Eligibility Criteria Evaluation	A breakdown of the rule criteria and the student’s results in the format: <criteria>   <student’s value> Any criteria the student did not meet are shown in bold, red text.
Last Run Date	The date the student’s eligibility for this program was last calculated.
Last Run Rule Name	The rule that was used to calculate the student’s eligibility for the program on the date their eligibility was last calculated.
Last Run Eligibility Status	The student’s eligibility status determined the last time their eligibility status was calculated. If the student’s status was re-calculated after they were assigned to the program, this status may be different from the Eligibility Status in the Program Assignment Eligibility Summary section.
Eligibility Criteria Evaluation	A breakdown of the rule criteria and the student’s results in the format: <criteria>   <student’s value> Any criteria the student did not meet are shown in bold, red text. If the student’s status was re-calculated after they were assigned to the program, this Eligibility Criteria Evaluation may be different from the Eligibility Criteria Evaluation in the Program Assignment Eligibility Summary section.

## Removing Participants from Programs

If a student leaves a program before the session is ending, remove them from the program.

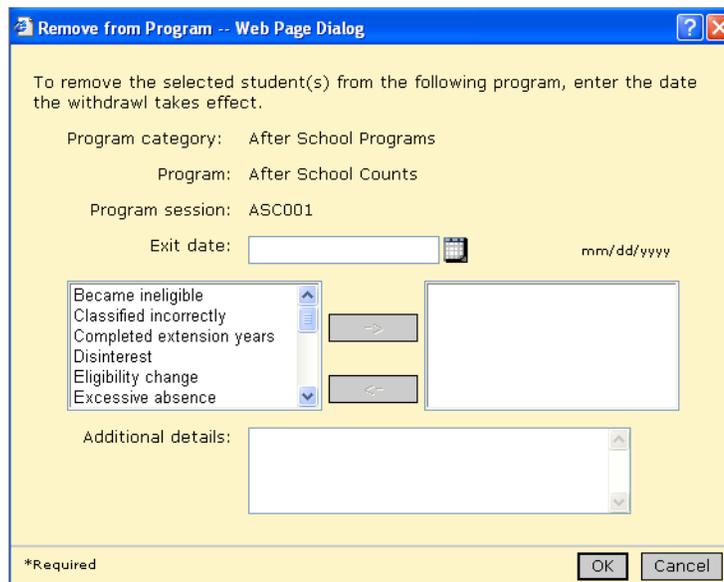
### TO REMOVE STUDENTS FROM PROGRAMS:

- 1 Log on as a district or school administrator.
- 2 Do one of the following:

To	Do this
Remove multiple students from programs	<ol style="list-style-type: none"> <li>1 In the control bar, click Manage Programs.</li> <li>2 On the Manage Programs page, search for a program.</li> <li>3 From the Search Results, in the # Participants column, click the number corresponding to the program session you want to work with.</li> <li>4 On the Manage Participants page, under Program Participants, select the students you want to remove from the program.</li> </ol>

To	Do this
Remove individual students from programs	<ol style="list-style-type: none"> <li>1 Open a student record.</li> <li>2 In the control bar, click Program Profile.</li> <li>3 On the Program Profile page, under Programs, select the programs you want to remove the student from.</li> </ol>

- 3 From the Actions menu, click Remove from Program.



- 4 In the Remove from Program dialog, enter the following information, as required:

Field	Description
Exit date	Enter the date the student is leaving the program. This date is typically the last official date the student is active in the program and must be greater than the students entry date.
Exit reasons	Select one or more reasons why the student is leaving the program.
Additional details	Enter any additional information about why the student is leaving the program.

- 5 Click OK.

## Moving and Copying Participants

If you copy programs, only the program setup is copied. Any participants assigned to the existing program sessions are not copied to the new program. If you want to copy participants to another program, you can copy them as applicants only. Once they are copied to the new program as applicants, you can re-calculate their eligibility and assign them to the new program.

For example, if you plan to make changes to a program in the next school year, you can end the program in the active calendar and then copy the program setup as a new program in the planning calendar. In this way, you can make changes to the program setup in the planning calendar without changing the program setup in the active calendar. To transfer the existing participants to the new program in the planning calendar, you must copy the participants as applicants.

### Note

To separate students who were participants in the previous program from students who applied to the new program after it was created, create two queues for the new program. Copy the existing participants into one queue and assign any new applicants to the second queue.

Students cannot be moved or copied into a program session if they are already applicants or participants in that program session. When students are moved or copied, their calculated eligibility criteria is cleared for the new program session.

### TO MOVE OR COPY PARTICIPANTS:

- 1 Log on as a district or school administrator.
- 2 In the control bar, click Manage Programs.
- 3 On the Manage Programs page, search for a program.
- 4 From the Search Results, in the # Participants column, click the number corresponding to the program session you want move or copy participants from.
- 5 On the Manage Participants page, under Program Participants, select the students you want to move or copy from the program.
- 6 From the Actions menu, click Move/Copy Participants.

The Move/Copy Participants page opens.

- 7 On the Move/Copy Participants as Applicants page, enter the following information, as required:

Field	Description
Move Participants	Select this option to remove the selected participants from the existing program session when they are copied to the new program session as applicants. The students removed from the existing session will be assigned an exit date for the existing program session.
Copy Participants	Select this option to retain the selected participants in the existing program session when they are added to the new program session as applicants.
Program Category	Select the program category for the program the students are being copied or moved to.
Program	Select a program where the students will be copied or moved to.

Field	Description
Program Session	<p>Select the session for the program you want to add the student to.</p> <p><b>Note</b>            If you have permission to apply students to other locations, this list includes all sessions defined for this program in the district.            If you log on as a school administrator and do not have permission to apply students to other locations, this list only contains sessions defined for your school.            If you log on as a district administrator and do not have permission to apply students to other locations, this list only contains sessions defined for the school assigned to the original queue.</p>
Queue	<p>Select the queue you want to add the selected students to.</p> <p>The list contains queues active for the selected program session.</p>
Move Exit Date	<p>If Move Participants is selected, enter the exit date for the existing program. This value will appear on the student's Program Profile page as the program exit date.</p>
Move Exit Reason	<p>If Move Participants is selected, select an exit reason. This value will appear on the student's Program Profile page as their Exit Reason.</p>

8 Click OK.

## Adding and Editing Student Program Details

For each program a student is a participant in, you can review information about the student, the program assignment, and the application forms. In addition, you can add and edit additional information about the student's participation in that program session.

The programs for each predefined program category includes additional fields related to the student's participation in the program. To track additional information, you can also add cTools fields to these pages. For more information about using cTools, see the Chancery SMS cTools Guide.

### Reviewing Program Details for a Student's Programs

You can use the Program Details page to review program information and, depending on the program category, enter or edit additional information about the student's participation in the program.

#### **TO OPEN THE PROGRAM DETAILS PAGE:**

- 1 Log on as a district or school administrator.
- 2 Open a student record.
- 3 In the control bar, click Program Profile.

- 4 On the Program Profile page, under Programs, select the program you want to view.
- 5 From the Actions menu, click Edit Program Details.

The Edit Program Details page opens.

To edit information about forms, see “Editing Information About Forms” on page 179.

To enter or edit information for a specific predefined program category, see the following topics:

Program Category	See
Academic Enhancement	“Entering and Editing Academic Enhancement Program Details” on page 180
After School Academic	“Entering and Editing After School Academic Program Details” on page 181
After School Athletics	“Entering and Editing After School Athletics Program Details” on page 182
Early Childhood Education	“Entering and Editing Early Childhood Education Program Details” on page 183
English Language Learners	“Entering and Editing English Language Learners Program Details” on page 185
Free & Reduced Meals	“Entering and Editing Free & Reduced Meals Program Details” on page 188

Program Category	See
Gifted and Talented	“Entering and Editing Gifted and Talented Program Details” on page 190
Home/Hospital	“Entering and Editing Home / Hospital Program Details” on page 191
Homeless	“Entering and Editing Homeless Program Details” on page 193
Migrant Status	“Entering and Editing Migrant Status Program Details” on page 195
Out of District Placement	“Entering and Editing Out of District Placement Program Details” on page 196
Special Services	“Entering and Editing Special Services Program Details” on page 198
Transportation	“Entering and Editing Transportation Program Details” on page 200

### Editing Information About Forms

- 1 Log on as a district or school administrator.
- 2 Open a student record.
- 3 In the control bar, click Program Profile.
- 4 On the Program Profile page, under Programs, select the program you want to view.
- 5 From the Actions menu, click Edit Program Details.
- 6 On the Program Details page, under Forms, do one of the following:

To	Do this
Edit a form	<ul style="list-style-type: none"> <li>• Update the fields directly on the page.</li> </ul> <p>OR</p> <ul style="list-style-type: none"> <li>• Select the form you want to update. From the Actions menu, click Edit Details &gt; Forms. Click OK.</li> </ul>
Delete a form	<ul style="list-style-type: none"> <li>• Select the form you want to delete. From the Actions menu, click Delete Row &gt; Forms.</li> </ul>

- 7 To edit a form, under Forms Received, indicate any form received from this student for this program application. Note that not all programs are

set up to collect forms. If applicable, enter or edit the following information, as required:

Field	Description
Form Name	Select the application, document, referral, or other form identified as being required for application to the program.
Date Received	Indicate the month, day, and year that the form was submitted to the office.
Received By	Enter the name of the staff member who accepted the form.
Date Verified	Indicate the month, day, and year the form was verified by a staff member.
Verified By	Enter the name of the staff member who verified the responses on the form, or who accepted the referral or preference.

- 8 To track additional forms, from the Actions menu, click Add Row > Form. Enter the necessary information.

### Entering and Editing Academic Enhancement Program Details

Students who show a high level of comprehension and skill and meet the individual eligibility criteria can be placed in Academic Enhancement programs for advanced learning. These programs help gifted and talented students excel in specific academic areas.

If a student is assigned to a program for the Academic Enhancement program category, you can enter additional information about the students participation in the program.

**TO ENTER OR EDIT PROGRAM DETAILS:**

- 1 Log on as a district or school administrator.
- 2 Open a student record.
- 3 In the control bar, click Program Profile.
- 4 On the Program Profile page, under Programs, select the program you want to view.
- 5 From the Actions menu, click Edit Program Details.

- On the Program Details page, under Program Information, enter or edit the following information, as required:

Field	Description
Participation reason	Enter the reason for placing the student in the program.
Anticipated future program	Indicate the Academic Enhancement or Gifted Program the student is expected to be placed in next year.

- Click OK.

## Entering and Editing After School Academic Program Details

Students can participate in after school academics programs, such as art or technical programs, or tutoring programs.

If a student is assigned to a program for the After School Academic program category, you can enter additional information about their participation in the program and the activities they are involved in through the program. Activity records are used to track the type of work or main areas of study the student will be focusing on in this program.

### TO EDIT PROGRAM DETAILS:

- Log on as a district or school administrator.
- Open a student record.
- In the control bar, click Program Profile.
- On the Program Profile page, under Programs, select the program you want to view.
- From the Actions menu, click Edit Program Details.
- On the Program Details page under Program Information, enter the following information, as required:

Field	Description
Participation reason	Indicate the reason for placing the student in the program.
Condition	Indicate other special conditions or groups the student participates in and which have an effect on this program.

- 7 Under Activities, do any of the following:

To	Do this
Edit an activity	<ul style="list-style-type: none"> <li>• Update the fields directly on the page.</li> </ul> OR <ul style="list-style-type: none"> <li>• Select the record you want to update. From the Actions menu, click Edit Details &gt; Activities. Click OK.</li> </ul>
Delete an activity	<ul style="list-style-type: none"> <li>• Select the activity you want to delete. From the Actions menu, click Delete Row &gt; Activities. Skip the remaining steps.</li> </ul>

- 8 Enter or edit the following information, as required:

Field	Description
Activity	Indicate the type of work or main areas of study on which the student will be focusing when in this program.
Instructional Min/Week	Indicate the number of minutes each school week that a student is served or receives specific activity instruction in the program.

**Note**

To add additional Activity records, from the Actions menu, click Add Activities.

- 9 Click OK.

### Entering and Editing After School Athletics Program Details

Students who meet eligibility requirements, including minimum GPA, sports physical, and parental approval, can participate in after-school sports activities, such as cheerleading, football, or tennis. For some students, ISP requirements, such as tutoring or an additional term paper, are required.

If a student is assigned to a program for the After School Athletics program category, you can enter additional information about their involvement in the program.

**TO EDIT PROGRAM DETAILS:**

- 1 Log on as a district or school administrator.
- 2 Open a student record.
- 3 In the control bar, click Program Profile.
- 4 On the Program Profile page, under Programs, select the program you want to view.
- 5 From the Actions menu, click Edit Program Details.

- 6 On the Program Details page, under Program Information, enter or edit the following information, as required:

Field	Description
Comp semesters to date	Enter the total number semesters the student has completed in the school to date.
Level of play	Enter the level of play, or year, for the sport in which the student will play.
Study Requirements	From the Available list, select any tasks or additional work the student must complete to participate in the sport and move these items to the Selected list.

- 7 Click OK.

### Entering and Editing Early Childhood Education Program Details

Children as young as three years old can be enrolled in early childhood education programs, which focus on basic skills, such as color recognition, number recognition, and basic language skills. Children are often given Child Assessment Profile (CAP) screenings to assess their placement and needs.

If a student is assigned to a program for the Early Childhood Education program category, you can enter additional information about their involvement in the program. You can also enter additional language, ECE, and family information.

Family Member records are used to track key members of the family and the roles they play in the student's education.

#### TO EDIT PROGRAM DETAILS:

- 1 Log on as a district or school administrator.
- 2 Open a student record.
- 3 In the control bar, click Program Profile.
- 4 On the Program Profile page, under Programs, select the program you want to view.
- 5 From the Actions menu, click Edit Program Details.

- 6 On the Program Details page, under Languages, review the following information:

Field	Description
Home language	Displays the language or dialect routinely spoken in the student's home. This language or dialect might not be the student's native language.  <b>Note</b> This field can be edited on the Student Demographics page. See "Entering Student Demographics Data" on page 144.
Dominant language	Displays the language the student best understands and is most comfortable with.  <b>Note</b> This field can be edited on the Student Demographics page. See "Entering Student Demographics Data" on page 144.

- 7 Under ECE Setting, enter or edit the following information, as required:

Field	Description
Length of day	Enter the amount of the school day during which the student receives program services.
Focus	Indicate whether the services provided to the student address specific developmental areas.
Language approach	Indicate the language used by teachers and assistants during instruction.
Components	From the Available list, select the care that will be provided during the program and move these items to the Selected list.
Family Day Care	From the Available list, select the type of after-school card the student receives and move these items to the Selected list.

- 8 Under Family Information, do any of the following, as required:

To	Do this
Add family information	<ul style="list-style-type: none"> <li>From the Actions menu, click Add Family Information.</li> </ul>
Edit family information	<ul style="list-style-type: none"> <li>Update the fields directly on the page.</li> </ul> <p>OR</p> <ol style="list-style-type: none"> <li>Select the family record you want to update.</li> <li>From the Actions menu, click Edit Family Information.</li> </ol>
Delete family information	<ol style="list-style-type: none"> <li>Select the family record you want to delete.</li> <li>From the Actions menu, click Delete Family Information.</li> <li>Click OK and skip the next step.</li> </ol>

- 9 To add or edit family information, enter or edit the following information, as required.

Field	Description
Role	Indicate the position of an adult family member whose education and position is to be tracked for the student.
Lives With	Indicate whether the student lives with the parent or guardian listed in the Roles field above.
Highest Educational Level	Indicate the highest level of education completed by the parent or guardian listed in the Roles field above.
Participation Level	Indicate the amount of involvement the parent or guardian listed in the Roles field above has with the student in an educational setting.

- 10 Under Household Information, review the following information:

Field	Description
Household Annual Income	Displays the total amount of money a student’s family earns in a single calendar year.  <b>Note</b> This field can be edited on the Student Background Data page. See “Entering Student Background Data” on page 147.
Household Size	Indicates the number of adults and children in a student’s family who are living in the same house.  <b>Note</b> This field can be edited on the Student Background Data page. See “Entering Student Background Data” on page 147.
Child of Another Student	Indicates whether the student is the child of a student already enrolled in the district.  <b>Note</b> This field can be edited on the Student Background Data page. See “Entering Student Background Data” on page 147.

- 11 Click OK.

### Entering and Editing English Language Learners Program Details

Students whose English-language skills have been assessed and who required enhanced English instruction based on testing can be enrolled in an English Language Learners program. This includes students whose first language is not English. These programs focus on increasing the student’s level of proficiency so they are not hindered in the classroom.

If a student is assigned to a program for the English Language Learners program category, you can enter additional information about their program participation including language, ELL, and family information.

**TO EDIT PROGRAM DETAILS:**

- 1 Log on as a district or school administrator.
- 2 Open a student record.
- 3 In the control bar, click Program Profile.
- 4 On the Program Profile page, under Programs, select the program you want to view.
- 5 From the Actions menu, click Edit Program Details.
- 6 On the Program Details page, under Languages, review the following information:

Field	Description
Home language	<p>Displays the language or dialect routinely spoken in the student's home. This language or dialect might not be the student's native language.</p> <p><b>Note</b> This field can be edited on the Student Demographics page. See "Entering Student Demographics Data" on page 144.</p>
Dominant language	<p>Displays the language the student best understands and is most comfortable with. A student may be dominant in one language in one situation, but dominant in another language in another situation.</p> <p><b>Note</b> This field can be edited on the Student Demographics page. See "Entering Student Demographics Data" on page 144.</p>
Native language	<p>Displays the language or dialect first learned by the student or first used by the parent/guardian with the student. Also referred to as primary language.</p> <p><b>Note</b> This field can be edited on the Student Demographics page.</p>
Other language	<p>Displays any other language, other than the dominant language, in which the student is proficient.</p> <p><b>Note</b> This field can be edited on the Student Demographics page. See "Entering Student Demographics Data" on page 144.</p>
Language at home not Eng	<p>Indicates whether the languages spoken in the student's home is not English.</p> <p>This is the first question in the Home Language Survey. This value is used to identify students who might require services in an English Language Learners program.</p> <p><b>Note</b> This field can be edited on the Student Demographics page. See "Entering Student Demographics Data" on page 144.</p>

Field	Description
Speaks language other than En	<p>Indicates whether the student speaks a language other than English.</p> <p>This is the second question in the Home Language Survey. This value is used to identify students who might require services in an English Language Learners program.</p> <p><b>Note</b> This field can be edited on the Student Demographics page. See "Entering Student Demographics Data" on page 144.</p>

7 Under ELL Setting, enter or edit the following information, as required:

Field	Description
Program year	Indicate the amount of time a student has been in an ELL program. The amount of time does not necessarily equate to school years that the student has been in ELL as it is dependent on entry dates, service breaks, exit dates, test scores, and grade levels.
Grade level at 1st entry	Enter the student's grade level when they first entered into an ELL program in any district.
Initial Eng proficiency	Enter the student's aptitude or ability level for English comprehension and academic performance based on specific state- or district-required screening instruments, along with teacher observations and performance data.
Reassess Eng proficiency	Enter the student's aptitude or ability level for English comprehension and academic performance - after a pre-defined time period of ELL instruction - and based on specific state- or district-required screening instruments, along with teacher observations and performance data.
Native lang proficiency	Enter the aptitude level for the student's native language comprehension and academic performance based on specific state- or district-required screening instruments, along with teacher observations and performance data.
Instructional group	Enter the instructional subgroup in which the student will be placed for ELL/ESL services.
Lgth of last srvc break	<p>Enter the amount of time, in months, that a student has not been assigned to an ELL program in any district.</p> <p>The amount of time does not include standard intersession and summer breaks.</p>
Optional support	From the Available list, select any services the student receives as part of the ELL program and move these items to the Selected list.

- 8 Under Parent/Guardian Status, enter the following:

Field	Description
Notification sent	Enter the month, day, and year that a letter was sent to the student's parent or guardian regarding the student's ELL status and potential for ELL services.
Approval status	Indicate whether the parent/guardian has approved the ELL services for the student.
Approval date	Enter the month, day, and year the parent/guardian formally approved ELL services for the student.

- 9 Click OK.

### Entering and Editing Free & Reduced Meals Program Details

Economically or socially challenged students can be provided access to free or reduced meal (FRM) programs. Depending on the student's situation, this program can include not only lunch, but other meals as well.

If a student is assigned to a program for the Free & Reduced Meals program category, you can enter additional information about their program participation including household information.

#### TO EDIT PROGRAM DETAILS:

- 1 Log on as a district or school administrator.
- 2 Open a student record.
- 3 In the control bar, click Program Profile.
- 4 On the Program Profile page, under Programs, select the program you want to view.
- 5 From the Actions menu, click Edit Program Details.
- 6 On the Program Details page, under Meal Specifics, enter the following information, as required:

Field	Description
Duration	Enter the length of time the student remains eligible for FRM (Free & Reduced Meals).
Temporary period	If a student's application is temporary, indicate the length of time the student may receive the free or reduced price meal until a final determination of eligibility is made.
Certification type	Indicate how the student is certifying for free and reduced meals.

Field	Description
Status change	Indicate the type of change in a student’s meal eligibility based on the contents of an application and current requirements of the program.
Other Benefits	From the Available list, select any other national school lunch program benefits the student is receiving and move these items to the Selected list.

7 Under Household Information, view or enter the following information, as required:

Field	Description
Household annual income	Displays the total amount of money a student’s family earns in a single calendar year. <b>Note</b> This field can be edited on the Student Background Data page. See “Entering Student Background Data” on page 147.
Household size	Displays the number of adults and children in a student’s family living in the same house. <b>Note</b> This field can be edited on the Student Background Data page. See “Entering Student Background Data” on page 147.
USDA income guidelines	Displays whether the household size qualifies student for free or reduced meals. The options are: <ul style="list-style-type: none"> <li>• meets income; free meals</li> <li>• meets income; reduced meals</li> </ul> <b>Note</b> This field can be edited on the Student Background Data page. See “Entering Student Background Data” on page 147.
Food stamp number	Displays the identification number given to a family when they are eligible to receive food stamps. <b>Note</b> This field can be edited on the Student Background Data page. See “Entering Student Background Data” on page 147.
TANF Number	Displays the identification number given to a family when they are homeless (Temporary Assistance to Needy Families). <b>Note</b> This field can be edited on the Student Background Data page.
FSDIR Number	Displays the identification number given to a family when they are identified as native peoples living on an official reservation (Food Distribution Program on Indian Reservations). <b>Note</b> This field can be edited on the Student Background Data page. See “Entering Student Background Data” on page 147.
Other case number	Displays an identification number given to a family for other purposes that may have a Free & Reduced Meals connection, such as a Medicare number. <b>Note</b> This field can be edited on the Student Background Data page. See “Entering Student Background Data” on page 147.

Field	Description
Parent/guardian signature on file	When students apply, indicate whether specific parent/guardian information was received as part of the student's FRM application. This field does not apply when the student is directly certified.
SSN info on file	When students apply, indicate whether the SSN number information was completed and verified. This field does not apply when the student is directly certified.
Social svrcs letter on file	Where the student is a foster child, when students apply, indicate whether the district received and is maintaining a letter from the state's social services agency (such as Department of Human Services) This field does not apply when the student is directly certified.
Student is a foster child	Displays the student's foster status. <b>Note</b> This field can be edited on the Student Background Data page. See "Entering Student Background Data" on page 147.
Foster personal income	If the student is a foster child, enter the amount of the student's personal use income.

8 Click OK.

## Entering and Editing Gifted and Talented Program Details

Students who show a high level of comprehension and skill and meet the individual eligibility criteria can be placed in Gifted and Talented programs for advanced learning. These programs help gifted and talented students excel in specific academic areas.

If a student is assigned to a program for the Gifted and Talented program category, you can enter additional information about their program participation.

### TO EDIT PROGRAM DETAILS:

- 1 Log on as a district or school administrator.
- 2 Open a student record.
- 3 In the control bar, click Program Profile.
- 4 On the Program Profile page, under Programs, select the program you want to view.
- 5 From the Actions menu, click Edit Program Details.

- 6 On the Program Details page, under Program Information, enter or edit the following information, as required:

Field	Description
Participation reason	Enter the reason for placing the student in the program.
Anticipated future program	Indicate the programs the student is expected to be placed in next year.

- 7 Click OK.

## Entering and Editing Home / Hospital Program Details

Students who, for physical or other reasons, are unable to attend school for a period of time, can be assigned to a Home/Hospital program.

If a student is assigned to a program for the Home/Hospital program category, you can enter additional information about their program participation including instructional information. Instructional information records are used to track who will be providing instruction to the student, as well as other information about how instruction is provided.

### TO EDIT PROGRAM DETAILS:

- 1 Log on as a district or school administrator.
- 2 Open a student record.
- 3 In the control bar, click Program Profile.
- 4 On the Program Profile page, under Programs, select the program you want to view.
- 5 From the Actions menu, click Edit Program Details.
- 6 On the Program Details page, under Episode Information, enter or edit the following information, as required:

Field	Description
Authorizing physician	Enter the name of the physician making the referral or recommendation.
Expected start date	Enter the approximate date when the instructional services to the student is expected to start.
Expected end date	Enter the month, day, and year that a physician states the student no longer requires the hospitalization or homebound referral.

Field	Description
Recovery location	Indicate where the student will be rehabilitated. The location can be home, hospital, rehab, center, and so on.
Medical diagnosis	From the Available list, select the illness or conditions the physician states as the reason the student is homebound or in the hospital and move these items to the Selected list.

7 Under Instructional Information, do any of the following, as required:

To	Do this
Add an instructional record	<ul style="list-style-type: none"> <li>From the Actions menu, click Add Instructional Information.</li> </ul>
Edit an instructional record	<ul style="list-style-type: none"> <li>Update the fields directly on the page.</li> </ul> <p>OR</p> <ol style="list-style-type: none"> <li>Select the record you want to update.</li> <li>From the Actions menu, click Edit Instructional Information.</li> </ol>
Delete an instructional record	<ol style="list-style-type: none"> <li>Select the record you want to delete.</li> <li>From the Actions menu, click Delete Instructional Information.</li> <li>Click OK and skip the following step.</li> </ol>

8 To add or edit instructional information, enter or edit the following information, as required:

Field	Description
Instructor/Provider	<p>Select the teacher, staff member, or non-staff member who will be providing instruction/service to the student during the rehabilitation. Instructors available for this program are defined at the district.</p> <p><b>Note</b> The number of students an instructor/provider can work with in a Home/Hospital program is based on a district preference. For more information about setting district preferences, see "Setting Program Management District Preferences" on page 22.</p>
Service Type	Indicate the type of service the provider will perform.
Alternate Teaching Location	Select the place where the student will receive the service, if not the same as the Recovery Location. The location can be home, hospital, rehab, center, and so on.
Approved Service Min/Week	If the service type is "related service", enter the number of service minutes planned for the student each week.
Approved Instruc Hours/Week	If the service type is "academic instruction", enter the number of instructional hours planned for the student each week.
First Day Taught	Enter the month, day, and year that the provider started instructing the student for the specified episode.

Field	Description
Last Day Taught	Enter the month, day, and year that the provider stopped instructing the student for the specified episode.
Total Service Minutes Provided	If the service type is “related service”, enter the number of service minutes that are actually provided for the student during the entire home/hospitalization period for each instructor/provider.
Total Instruc Hours Provided	If the service type is “academic instruction”, enter the number of instructional hours that are actually provided for the student during the entire home/hospitalization period for each instructor/provider.

- 9 Click OK.

### Entering and Editing Homeless Program Details

Students who are homeless can be given additional learning and support opportunities to help them keep up with their studies.

If a student is assigned to a program for the Homeless program category, you can enter additional information about their program participation including dwelling information. Dwelling information records are used to track where the student is currently living.

#### TO EDIT PROGRAM DETAILS:

- 1 Log on as a district or school administrator.
- 2 Open a student record.
- 3 In the control bar, click Program Profile.
- 4 On the Program Profile page, under Programs, select the program you want to view.
- 5 From the Actions menu, click Edit Program Details.
- 6 On the Program Details page, under Status Information, view or edit the following, as required:

Field	Description
Lacks nighttime residence	Displays whether the student lacks a fixed, regular, and adequate nighttime residence and has a primary residence that is a shelter of some type; an institution that provides temporary residence; or some other place not designed for regular sleeping accommodations for human beings.  <b>Note</b> This field can be edited on the Student Background Data page. See “Entering Student Background Data” on page 147.

Field	Description
Minor/adult status	Displays a student's status in relation to legal adulthood as specified by state law.  <b>Note</b> This field can be edited on the Student Background Data page. See "Entering Student Background Data" on page 147.
School of origin	Enter the name of the school the student attended when permanently housed or the school in which the student was last enrolled.  <b>Note</b> The school does not have to be a school in the district.
Transfer date from school	Enter the month, day, and year the student first transferred out of the school of origin.

7 Under Dwelling Information, do any of the following, as required:

To	Do this
Add dwelling information	<ul style="list-style-type: none"> <li>From the Actions menu, click Add Dwelling Information.</li> </ul>
Edit dwelling information	<ul style="list-style-type: none"> <li>Update the fields directly on the page.</li> </ul> <p>OR</p> <ol style="list-style-type: none"> <li>Select the record you want to edit.</li> <li>From the Actions menu, click Edit Dwelling Information.</li> </ol>
Delete a dwelling information record	<ol style="list-style-type: none"> <li>Select the record you want to delete.</li> <li>From the Actions menu, click Delete Dwelling Information.</li> <li>Click OK and skip the next step.</li> </ol>

8 To add or edit dwelling information, enter or edit the following information, as required:

Field	Description
Initial date of residence	Enter the month, day, and year that the student/family officially retained residency at the current location.
Dwelling Type	Select the category or type of residence where a student resides.
Resides with	Indicate the role or type of individual the student resides with, if any.
Contact name	Enter the name of the individual who might be able to reach the student at the dwelling or who manages the dwelling.
Contact phone	Enter the phone number of the contact or residence listed above.

Field	Description
Closest known address	Enter the street address, city, state, and zip code of the dwelling. If address not available, enter directions to the dwelling.
Date ended residence	Enter the month, day, and year the student is known to no longer reside at the dwelling.

- 9 Under Services, from the Available list, select the activities or other programs the student is to receive as part of the program and move these items to the Selected list.
- 10 Click OK.

### Entering and Editing Migrant Status Program Details

Students who qualify for migrant programs can be given additional learning and support opportunities to help them keep up with their studies.

If a student is assigned to a program for the Migrant Status program category, you can enter additional information about the student's participation in the program.

#### TO EDIT PROGRAM DETAILS:

- 1 Log on as a district or school administrator.
- 2 Open a student record.
- 3 In the control bar, click Program Profile.
- 4 On the Program Profile page, under Programs, select the program you want to view.
- 5 From the Actions menu, click Edit Program Details.
- 6 On the Program Details page, under Qualifying Information, enter or edit the following information, as required:

Field	Description
Migrant status	Indicates whether the student, or parent/guardian of a minor, maintains primary employment in one or more agricultural or fishing industries on a seasonal or temporary basis.  <b>Note</b> This field can be edited on the Student Demographics page. See "Entering Student Demographics Data" on page 144.
Migrant classification subgroup	Indicate the status of a migrant student as specified by migratory pattern and industry by which the student/family is influenced.

Field	Description
Current residency status	Enter the month, day, and year that a family unit or student establishes residency within the school district within the state.
Current qualifying arrival date	Enter the month, day, and year that a migrant student arrived at the place where the qualifying work was sought.
Qualifying arrival city	Enter the city where the student's previous school district is located.
Qualifying arrival state	Enter the postal code of the state or outlying area where the student's previous school district is located.
Qualifying arrival country	Enter the country where the student's previous school district is located.
Join type	Indicate the underlying purpose of the student/family's last qualifying move, as it relates to a "to join" condition.
To join date	Where a student and the rest of the family do not move together, indicate the month, day, and year that the child and worker complete the move.
Move purpose	Indicate the underlying purpose of the student/family's last qualifying move, as it relates to specific employment conditions.
Employment type	Indicate the industry and time period of the qualifying work sought by the move as it relates to the principal means of livelihood for the student/family.
Industrial survey on file	Indicate whether a formal industrial survey was done. Industrial surveys establish the work that is available year-round is actually temporary for the purpose of migrant status due to specific issues. These surveys are completed for specific federal job categories.
Comments	Enter information that explains the qualifying conditions of the student/family.

- 7 Under Services, from the Available list, select the activities or programs the student is to receive in the Migrant Program and move these items to the Selected list.
- 8 Click OK.

### Entering and Editing Out of District Placement Program Details

Occasionally, students are required to attend a program that is not offered within the district of their current home school. These students can be placed in Out-of-District programs.

If a student is assigned to a program for the Out-of-district Placement program category, you can enter additional information about the student's participation in the program, including placement information. Placement information records are used to track out-of-district facilities where students are placed.

**TO EDIT PROGRAM DETAILS:**

- 1 Log on as a district or school administrator.
- 2 Open a student record.
- 3 In the control bar, click Program Profile.
- 4 On the Program Profile page, under Programs, select the program you want to view.
- 5 From the Actions menu, click Edit Program Details.
- 6 On the Program Details page, under Special Service Info, enter or edit the following information, as required:

Field	Description
Last IEP/FIE date	Indicate the month, day, and year the student last had an IEP (Individualized Education Plan) with an FTE (Full and Individual Evaluation) completed and signed off.
Last annual IEP date	Indicate the month, day, and year the last annual IEP was completed and signed off.
Last special IEP date	If an additional IEP was initiated, completed, and signed off, indicate the month, day, and year it was completed and signed off.
Primary disability	Indicate the main special education disability of concern.

- 7 Under Placement Information, do one of the following, as required:

To	Do this
Add a placement information record	<ul style="list-style-type: none"> <li>• From the Actions menu, click Add Placement Information.</li> </ul>
Edit a placement information record	<ul style="list-style-type: none"> <li>• Update the fields directly on the page.</li> </ul> <p>OR</p> <ol style="list-style-type: none"> <li>1 Select the record you want to edit.</li> <li>2 From the Actions menu, click Edit Placement Information.</li> </ol>
Delete a placement information record	<ol style="list-style-type: none"> <li>1 Select the record you want to delete.</li> <li>2 From the Actions menu, click Delete Placement Information.</li> <li>3 Click OK and skip the next step.</li> </ol>

- 8 To add or edit a placement information record, enter or edit the following information, as required.

Field	Description
Suggested placement	Enter the name of the facility where the student will receive instruction or be moved to, if the facility accepts the placement.
Facility #	Enter the identification number (private facility code) of the location where the student hopes to be placed.
Placement coordinator	Enter the name of the contact at the placement facility. Can be social worker, principal, and so on.
Acceptance status	Indicate whether the private facility accepted the student's enrollment.
Start date	Enter the date the student was assigned to and began an Out of District Placement by the placement coordinator.
Nonacceptance reason	If the facility did not accept the student's referral, indicate why the referral was turned down.

- 9 Click OK.

### Entering and Editing Special Services Program Details

Students with physical or learning disabilities requiring specialized learning environments, such as braille, can be enrolled in Special Services programs.

If a student is assigned to a program for the Special Services program category, you can enter additional information about the student's participation in the program including accommodations and disability & services records.

#### TO EDIT PROGRAM DETAILS:

- 1 Log on as a district or school administrator.
- 2 Open a student record.
- 3 In the control bar, click Program Profile.
- 4 On the Program Profile page, under Programs, select the program you want to view.
- 5 From the Actions menu, click Edit Program Details.

- 6 On the Program Details page, under IEP Information, enter or edit the following information, as required:

Field	Description
Last IEP/FIE date	Indicate the month, day, and year the student last had an IEP and FIE document signed off.
Last annual IEP date	Indicate the month, day, and year the student's last annual IEP was completed and signed off.
Last special IEP date	Indicate the month, day, and year that any special IEP for the student was completed and signed off.
Next IEP annual review	Indicate the month, day, and year that the required IEP annual review will be performed.
IEP triennial review	Indicate the month, day, and year that the required IEP triennial review will be performed.

- 7 Under Accommodations, enter or edit the following information, as required:

Field	Description
Least restrictive environment	Indicate the percent of time the student spends outside of regular education.
SPED environment	Indicate the student's special education environment with or without integrated activities.
Test accommodations	Select the special condition that should be enabled for the student during tests.

- 8 Under Disabilities & Services, do any of the following, as required:

To	Do this
Add a disabilities & services record	<ul style="list-style-type: none"> <li>From the Actions menu, click Add Disabilities &amp; Services.</li> </ul>
Edit a disabilities and services record	<ul style="list-style-type: none"> <li>Update the record directly on the page.</li> </ul> <p>OR</p> <ol style="list-style-type: none"> <li>Select the record you want to edit.</li> <li>From the Actions menu, click Edit Disabilities &amp; Services.</li> </ol>
Delete a disabilities and services record	<ol style="list-style-type: none"> <li>Select the record you want to delete.</li> <li>From the Actions menu, click Delete Disabilities &amp; Services.</li> <li>Click OK and skip the next step.</li> </ol>

- 9 To add or edit Disabilities & Services records, enter or edit the following information, as required:

Field	Description
Eligibility date	Enter the month, day, and year that a student was initially assigned to a disability or service.
Disability	Select a special education disability or related condition.
Related service	Select a standard service to be provided to the student with a specific disability.
Provider	Enter the name of the person providing services to the student with the disability.
IEP minutes	Enter the minutes of instruction; therapy; or other service that the provider will provide to the student each week.
Close dates	Enter the month, day, and year the student is no longer eligible for the service or no longer assigned to the disability.

- 10 Click OK.

### Entering and Editing Transportation Program Details

Students who live at least a certain distance from their home school may qualify for Transportation programs provided their home address is in the school's area.

If a student is assigned to a program for the Transportation program category, you can enter additional information about the student's participation including distance & routes, vehicles, and run types.

#### TO EDIT PROGRAM DETAILS:

- 1 Log on as a district or school administrator.
- 2 Open a student record.
- 3 In the control bar, click Program Profile.
- 4 On the Program Profile page, under Programs, select the program you want to view.
- 5 From the Actions menu, click Edit Program Details.

- 6 On the Program Details page, under Transportation Basics, view or edit the following information, as required:

Field	Description
Distance from school	Displays the distance, in miles, to a student's home address from the student's home school. <b>Note</b> This field can be edited on the Student Demographics page. See "Entering Transportation Data" on page 146.
Home address is in school's area	Displays whether the student's home address meets any boundary conditions, i.e., physical area borders, for the student's home school. <b>Note</b> This field can be edited on the Student Demographics page. See "Entering Transportation Data" on page 146.
Aide qualifications	Select the qualification status of a student who's entitled to receive state transportation aid.
Accommodations	Enter any specific requirements needed by the student, based on physical or emotional conditions.

- 7 Under Distance & Routes, enter the following:

Field	Description
Total distance transported (miles)	In miles, the total round-trip distance the student travels between their transfer points or bus stops and the school.
Total time transported (minutes)	In minutes, the total round-trip time the student travels between their transfer points or bus stops and the school.
Vehicle	From the Available list, select types of vehicles used and move them to the Selected list.
Run Type	From the Available list, select the run types and move them to the Selected list.

- 8 Click OK.



# GLOSSARY

## Active Enrollment

An active enrollment is an enrollment record with a status type of entry or re-entry (status types are defined in the Status Code setup list) that does not have a corresponding withdrawal record when the date of the enrollment record is on or before the district active calendar end date.

## Applicant

A student who has applied to a program or school. A student is considered an applicant until they are assigned to the program, enrolled in the school, or withdraw their application.

## Application

When a student applies to a program or school, an electronic application record is created. Student can apply to multiple programs.

## Capacity

The number of seats allocated for a program or school. Districts define capacities for locations. Districts also define the Over Capacity percentage, i.e., the amount a program can exceed its capacity.

## Capacity Control

Schools can use capacity settings on program queues to limit the number of students that can be assigned to a program or enrolled in a school.

For program queues, the eligibility constraints are often defined by characteristics, such as racial balances, capacity, age, grade, and capacity of grade levels, attendance, failing schools, and so on. These constraints can also be associated with capacity limitations. For example, a program might allocate 10 seats for students who have less than the required test score results.

## Controlled Enrollment

Enrollment in a school is restricted to a specific student population, such as gifted and talented students.

Districts use programs to control enrollment in schools. If a school is assigned a program that controls enrollment, all students in the school must be offered a position in a controlled enrollment program at that school before they can enroll in the school. Schools can have both controlled enrollment programs and open enrollment programs. Once students are enrolled in the school, they can apply to and be assigned to other programs at that school.

If a school wants to control enrollment to one program and offer open enrollment to students not in that program, they must set up two controlled enrollment programs, one that specifies the eligibility criteria and capacity for the student population they want to control and one that does not have eligibility criteria and capacity limits for the other students to enroll in the school.

## Controlled Enrollment Program

A program that is used to control enrollment at schools.

If a controlled enrollment program is assigned to a school, all students must be offered a position in a controlled enrollment program at that school before they can enroll in the school. Schools can have multiple controlled enrollment programs, as well as programs that do not control enrollment. Once students are enrolled in a controlled enrollment school, they can be assigned to other programs at that school, both programs that control enrollment and programs that do not.

## Eligibility Criteria

The specific requirements that determine whether a student qualifies for a program or queue.

Some programs and queues have specific eligibility criteria that restrict which students can participate in the program or queue. For example, students must have a family income between \$10,000 and \$20,000. Other programs or queues may have more relaxed eligibility criteria, such as enrollment in a specific grade. Some programs or queues may be open to all students and not have any eligibility criteria.

## Jump the Queue

The concept of manually placing a student in a program, regardless of their queue status and rank, and eligibility criteria. Only users with permissions to override eligibility criteria can “jump the queue”.

## Lottery Enrollment

A process of assigning students to programs or schools with capacity limits in which applicants are selected randomly rather than in the order their application was entered.

To set up lottery enrollment, districts define program queues to use a random rank method. When you calculate ranks for the queue, students are randomly assigned a rank and the order they entered the queue does not influence their rank placement.

After the lottery has been run (i.e., ranks are calculated for applicants), schools can rank additional students by either appending them to the existing ranking or re-running the lottery (i.e., recalculating the ranks for all students in the queue).

Typically districts or schools run the lottery once or twice a year to determine the order in which students qualify.

## Off-Campus Facilities

A program location that is not a school or school building.

Off-campus locations can be business or community buildings where the district operates a program. Depending on how the school manages off-campus facilities, they may be set up in Chancery SMS as a school, a building at a school, or as an off-campus facility.

## Open Enrollment

Enrollment in the school is open to the general student population, i.e., it is not restricted to a specific student population like gifted and talented students.

Open enrollment schools may offer programs, but these programs do not control enrollment in the school. Students can apply for programs at open enrollment schools either before or after they enroll in the school.

## Participant

A student who is currently assigned to a program. Students can be participants in multiple programs.

## Program

Programs are specialized activities or courses of study that are enhancements to or replacements for regular academic programs. For example, a district may have programs for after-school athletics, free and reduced meals, and homeless students. Programs can also be used to control enrollment at schools.

## Program Category

Program categories are the first level of program organization. All program groups and programs are contained within a program category. Students are not assigned directly to program categories; rather, they are assigned to programs contained within program categories.

## Program Group

Program groups contain similar programs within a program category.

You do not have to use program groups. Students are not assigned directly to program groups; rather, they are assigned to programs that may be contained within program groups.

## Program Location

The physical location where program sessions are offered. Districts define program locations, which may be schools or off-campus facilities. A single program may be available in several locations.

## Program Session

The dates programs are offered at specific locations. Districts define program sessions and assign them to locations. One program may have multiple sessions in several locations.

## Queue

A program wait list. All students are assigned to at least one queue when they apply to a program.

Queues can have eligibility criteria that restrict which students can be assigned to the queue, such as a sibling queue. Queues can also set capacity limits that restrict the number of students who can be assigned to the program through that queue. Programs can have multiple queues and the total capacity for all queues equals the program capacity.

Districts can also define the rank method for queues. If the rank method is sequential, students are assigned to programs based on the order their application was entered in the queue. When the random rank method is used, students are selected in a random order for placement into the program to create a lottery enrollment process.

## Queue Status

A student's status in a queue for that program, e.g., Offered, Rejected, Applied, and so on.

## Rank

The student's priority for being assigned to a program. Ranks are calculated for all students in a program queue.

Depending on how the queue is set up, ranks may be assigned sequentially in the order students apply to the program or randomly to create a lottery enrollment where the order students apply to the program does not influence their rank.

Rank calculations may also consider the student's rank weight. If rank weight is used for a queue, students with the same rank weight value are processed together and students with a higher rank weight are processed before students with a lower rank weight.

## Rank Override

With permission to override calculated ranks, users can change a student's calculated rank.

## Status Override

With permission to override calculated queue status, users can override a student's calculated queue status and place the student in programs even if they do not meet the eligibility criteria for the queue.



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