



2019-2020

**School Clerical Staff**

**MyEd BC**

**Manual**

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## 1.0 Cross-Enrolling/Secondary Students

Students are able to take courses from more than one school at a time; they are said to be cross-enrolled to additional schools from their main school. In **MyEdBC**, there are two types of students at a school: Primary students and Secondary students. This does not refer to the grade level of those students, but rather what school is the main school the student is attending. A student at their home school is considered to be a **Primary** student there. A student at their Cross-Enrolled school is said to be a **Secondary** student there. These terms will show up throughout the application, so be aware of their meanings.

### 1.1 Creating Secondary School Associations

1. From the **School** view, click the **Student** top tab.

2. Click **Options**, and select **Create Secondary School Associations**. The Create Secondary School Associations wizard appears:

Select the top tab- **Push** – Primarily used for Summer School, this will create secondary school associations for groups of students who are primary to the school for a different school.

The screenshot shows a web browser window titled "Create Secondary School Associations - Google Chrome". The address bar shows a secure connection to "https://sdt.myeducation.gov.bc.ca/asp/multiCreateSchool...". The main content area has two tabs: "Push" (selected) and "Pull". Below the tabs is a form with the following fields:

- Secondary school: Bayside Middle (dropdown menu)
- District year: 2017-2018 (dropdown menu)
- Start date: 8/9/2017 (calendar icon)
- End date: 8/10/2018 (calendar icon)

Below the date fields is a section titled "Students" with two radio buttons: "Selection" (selected) and "Snapshots". Below this is a text box that says "Selected students: 0". At the bottom of the form are two buttons: "OK" and "Cancel".

- **Secondary School** – the current school
- **District year** – select the correct year
- **Start Date** – The date the secondary association will start
- **End Date** – The date the secondary association will end

- **Legal first name** – student legal first name (optional)
- **Legal last name** – student legal last name
- **Gender** – Gender as appears on student identification documentation
- **Date of Birth** – Date of Birth as it appears on student identification documentation

Click **Search** – a confirmation message will state the association was created or that no matching results were found

3. Select the **District year** for the Cross Enrollment.

4. Enter the **Start date** and **End date** that the student will attend the secondary school. These will default to the start and end date of the school calendar.

5. Click (**Selection- select individual students from a list** or **Snapshot- use a snapshot of students**) Search. A pop-up lists the student's name, some demographic information, and contact information for the student's primary school. Choose the student you want to cross-enroll and click OK.

Or select Pull:


**Pull** – Create secondary school associations for students coming to the school, **this is the standard method** used for a single student.

- **Secondary School** – the current school

- **District year** – select the correct year
- **Start Date** – The date the secondary association will start
- **End Date** – The date the secondary association will end
- **Legal first name** – student legal first name (optional)
- **Legal last name** – student legal last name
- **Gender** – Gender as appears on student identification documentation
- **Date of Birth** – Date of Birth as it appears on student identification documentation

Click **Search** – a confirmation message will state the association was created or that no matching results were found.

If the correct student is found than select **OK**.

The student(s) should now appear in the Student list under the All Active Students filter with a Cross-Enrollment icon (  ) in the Alerts column. See the exception to this in Future Cross Enrollments below for future dated students.

## Setting Attendance Management Type for Secondary Students

Depending on the school preference setting for Secondary School Management, the Attendance management type for secondary students may need to be set.

### Option 1 – Setting attendance management type for an individual student

- School view> Student top tab.
- Select the student and click the Membership side tab > Schools sub side tab. The student’s list of former and secondary school associations will appear.
- Click the blue hyperlink for the record representing the school.
- Set the Attendance management type field as appropriate.

### Option 2 - Setting attendance management type for multiple students

- School view > Global top tab > Favorite side tab > Student School Association table.
- Use the filter called Type: Secondary to filter to the students who are secondary students at the school. Check the Name field to ensure all records are for the school.
- Review the AttMag Type field and update using mass update or modify list function

## 1.2 Future Cross Enrollments

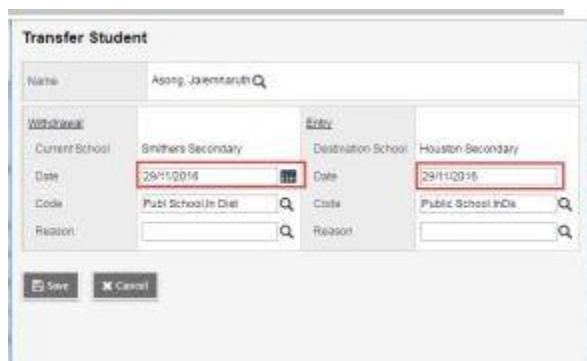
When cross-enrolling a student during the current school year using a future date, follow the same steps as above, entering a future date for the secondary school association.

The cross enrollment icon will display on the start date of the Secondary School Association and the student will show in the All Active Students filter. The Future cross-enrollments filter will display all secondary students in the school with a start date after today’s date, and the student will show in the All Secondary Students and All Students filters.

### 1.3 Ending Secondary School Associations

Please see the sections:

- Withdraw Student Wizard – Students with an **Active status** that are **Secondary** to the school
- Withdraw Student Wizard – Students with an **Active no Primary status** that are **Secondary** to the school



- **Withdrawal** – creates the Membership > Enrolment W record for the sending (current) school
  - **Current school** – auto populates the sending school
  - **Date** – date of withdrawal
  - **Code** – the withdraw code for the sending school record
  - **Reason** – not required, use per district practice
- **Entry** – creates the Membership > Enrolment E record for the receiving (destination) school
  - **Current school** – auto populates the receiving school
  - **Date** – date of enrollment (for enrollment record and PSR consistency it is recommended that the withdrawal date and enrolment date are not the same day)
  - **Code** – the enrollment code for the sending school record
  - **Reason** – not required, use per district practice

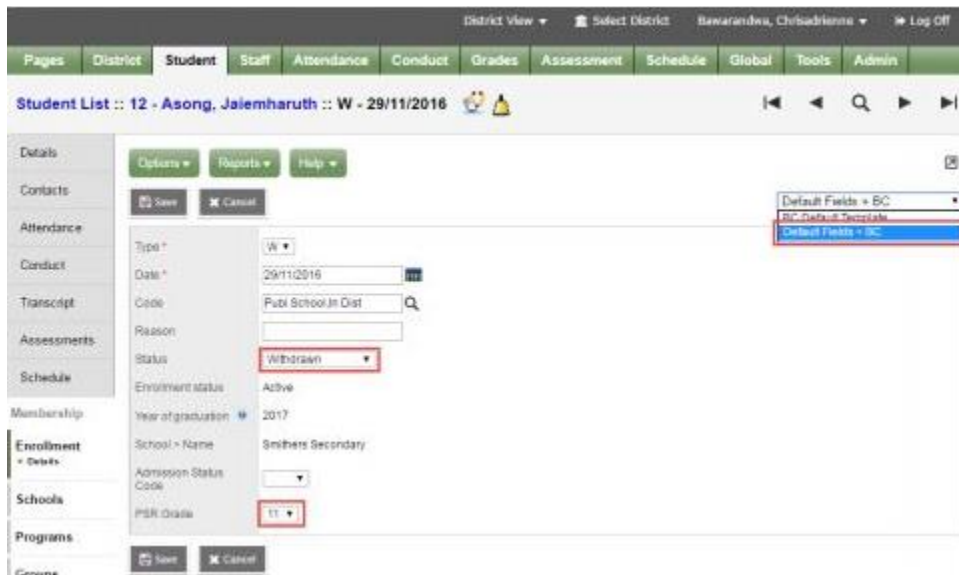
The student Membership > Enrollment record will be populated using the values entered above:

Houston Secondary - Enrollment status: Active - Year of graduation: 2017

| Type | Date       | Code                  | Reason | Status | En Status | YOG  | School Name       | Admission Status Code | PSR Grade |
|------|------------|-----------------------|--------|--------|-----------|------|-------------------|-----------------------|-----------|
| E    | 29/11/2016 | Public School In Dist |        | Active | Active    | 2017 | Houston Secondary |                       |           |
| W    | 29/11/2016 | Publ School In Dist   |        | Active | Active    | 2017 | Houston Secondary |                       |           |

To adjust the PSR grade or other fields, click into the details of the record

- Select the template for Default Fields + BC
- Change record details as necessary for accuracy
- Save



## 2.0 Transferring Students

### 2.1 Transferring a Student from One School to Another

The Transfer Student function allows one school to pull a student in from another school in the district (**only**), without taking each individual step of withdrawing them and enrolling them at the new school during the current school year.

The **MyEducation BC Standards Manual** states that students moving between districts should be withdrawn from the sending school and registered to the receiving school. Transfer function should **only** be used within districts in BC.

The Transfer function is only currently available in the enterprise security roles: District Support (Help Desk/Level 1) and Registrar roles.

To perform a Transfer of a student from one school to another: Send the District L1 a request to have the student transferred. The school initiates the process: School view > Student top tab > Details

- **Transfer pending** – check the checkbox
- **Transfer School > Name** - Select the receiving school using the magnifying glass picklist and click OK



- Click the **Save** button in the student details page.

The student is now ready for the **Receiving School** to accept the transfer.

Contact the District's L1 to complete the transfer

## 2.2 Primary School Transfer

A **Primary School Transfer** occurs when a student needs to *swap* their Primary and Secondary Schools. To perform this task, we will make use of the Transfer function. See ***Transferring a Student from One School to Another*** for details.

There are six parts to performing a **Primary School Transfer** in MyEducation BC: ***take a screenshot*** of the student schedule, set the transfer of the student from the original primary to the original secondary school (which will make the primary); end the secondary association at the original secondary school; complete the transfer; and cross-enroll the student back to the original primary school (which makes it now the secondary).

### • **Screenshot of student schedule: (school A)**

School or District view > Student > Schedule

- Take a screenshot of the student schedule for use later

#### 2.2.1 Set the transfer at the primary school: **(school A)** (For complete details see Transferring a Student from One School to Another)

School or District view > Student top tab > Details

- Transfer pending – check the checkbox
- Transfer School > Name - Select the receiving school using the magnifying glass picklist and click OK
- Click the **Save** button in the student details page.

#### 2.2.2 End the Secondary Association: **(school B)**

- School > Student > Membership > Schools > Click into the details of the secondary association and enter or edit the end date to the day prior to the transfer. Using the current date will overlap the secondary associations with the primary associations for one day, while confusing to view it will clear up the next day.

#### 2.2.3 Complete the Transfer: **(school B)**

Contact district L1 to complete this process

#### 2.2.4 Create Secondary Association: **(school A)**

See the section Creating Secondary School Associations for the steps to create the secondary association for school (A)

## 2.2.5 Recreate the student schedule using the screenshot taken: (school A)

### Review Student Enrollment

Information All enrollment information is located in the Membership side tab. Student top tab > select student > Membership side tab.

## 3.0 Other Registration Tasks

### 3.1 View current and past primary enrollments

Existing and historical Primary School enrollments, status change and YOG change records are found in the Enrollment side tab. See the sections on: **Changing a Student's Enrollment Status** and **Changing a Student's Year of Graduation** for details.

Edits to the details of a record for a primary student can be made by clicking into the details of the record.

Smithers Secondary - Enrollment status: Active - Year of graduation: 2020

| Type | Date       | Code                 | Reason         | Status    | EnrStatus | YOG  | School - Name              | Admission Status Code      | PER Grade |
|------|------------|----------------------|----------------|-----------|-----------|------|----------------------------|----------------------------|-----------|
| E    | 31/08/2015 | From Previous School | Administrative | Active    | Active    | 2020 | Smithers Secondary         |                            | 06        |
| W    | 31/07/2015 | To Next School       | Personal       | Withdrawn | Active    | 2020 | Bulky Valley Education Com |                            | 07        |
| E    | 06/05/2015 | Interp. Switch/De    |                | Withdrawn | Active    | 2020 | Bulky Valley Education Com |                            | 07        |
| W    | 29/09/2012 | Reason Unknown       |                | Withdrawn | Active    | 2020 | St. Joseph's - Smithers    |                            | 04        |
| E    | 04/09/2007 | First Time Entry     |                | Withdrawn | Active    | 2020 | St. Joseph's - Smithers    | BC   Home School in BCeS43 | KH        |

### 3.1.2 View current and past cross-enrollments (Secondary School Associations)

Current secondary school association, historical secondary school associations and former primary school associations are found in the Schools sub side tab.

Secondary and Former school associations allow the school to view student details, pull necessary reports and edit course records attached to their school as required.

For details on **creating Former school associations**, see section **Withdraw Student Wizard – Step 1 - Students with an Active status who are Primary to the school** for details.

For details on Secondary Associations, see the section **Creating Secondary School Associations**.

### 3.2 Change a Student Enrollment Status

When a manual change to a student status is required these can be made in the registration set of the options menu. Enrollment changes can be made for Active and PreReg students.

Primarily this is used to **update** a student with the status of Pre Reg to Active during the current school year. (End of Year Rollover will set all Pre Reg students to Active for the following school year)

School or District view > Student top tab > Select the student

#### • Options > Registration > Change Student Status

- **Name** – populates if the student was selected, or the student can be selected using the magnifying glass picklist.
- **Current Primary School** – will populate the current primary school
- **Date** – the date the change will take place

- **Reason** – optional use per district policy
- **Status** – select the appropriate status
  - ♣ **Active** – will be active in the school
  - ♣ **Withdrawn** – will be withdrawn from the school
- Click **Save**

The change made is visible in the following location: Student top tab > select student > Membership side tab > Enrollment sub-side tab. All changes to Enrollment Status will be indicated with a **S**.

| <input type="checkbox"/>            | Type | Date       | Code                 | Reason  | Status | EnrStatus | YOG  | School > Name      | Admission Status Code | PSR Grade |
|-------------------------------------|------|------------|----------------------|---------|--------|-----------|------|--------------------|-----------------------|-----------|
| <input checked="" type="checkbox"/> | S    | 07/04/2017 |                      | Pre-reg | Active | PreReg    | 2016 | Smithers Secondary |                       |           |
| <input checked="" type="checkbox"/> | E    | 07/04/2017 | From Previous School |         | PreReg | PreReg    | 2016 | Smithers Secondary |                       | 11        |

Click into the details of the **S** record for more information on the Enrollment Status change.

### 3.3 Change a Student Year of Graduation

The Year of Graduation (YOG) can only be changed for an Active student. See **Changing a Student's Registration Status** for details on how to change a student Status to Active, and then change them back to their proper status once the YOG has been updated.

To change a YOG for a student:

**School view > Student top tab**

#### Changing a Student's Year of Graduation (YOG)

There are several reasons why you may need to change a student's Year of Graduation during the school year. You could have an error when the student was enrolled, a student could be promoted to the next grade during the year, or any number of reasons based on your school's business rules.

You can only change the Year of Graduation (YOG) for an **Active** student. If they are Withdrawn, PreReg or Graduated, you **cannot** change their YOG. You will either need to wait until they are made active or change their registration status following the steps in section– **Changing a Student's Registration Status** above to Active, and then changing them back to their proper status once the YOG has been updated.

**Note:** If you change a student's Year of Graduation in their Student Details page, you will see it updated in that screen, but not elsewhere in the application. Always follow the procedure below to ensure that the YOG is changed in all places it will be used.

To change a YOG for a student, you will be in the Student List:

**School view > Student top tab**

1. Place a check in the checkbox by the name of the student who's YOG you wish to change.
2. From the Options menu, select Registration > Promote/Demote Student





3. This will bring up the Promote/Demote Wizard. Here you can put in a date for when this change is to take place (usually the current date), fill in a reason (if necessary), and the new YOG. This will calculate the Grade Level based on the current school year.

 A screenshot of the 'Promote/Demote Student' wizard form. The form has a yellow sidebar on the left with labels: Name, Current Primary School, Date, Reason, and Year of graduation \*. The main area contains the following fields: Name (Johnson, Lise), Current Primary School (Abbotsford Virtual), Date (28/01/2015 with a calendar icon), Reason (empty text box with a search icon), and Year of graduation \* (2016) and Grade level (11).

4. Click the OK button to make the changes.

You can see the change made in the following location:

Student top tab > select student > Membership side tab > Enrollment sub-side tab. All changes to Year of Graduation will be indicated with a **Y**

| Type | Date       | Code | Reason | Status | EnrStatus | YOG  | School > Name      | Admission Status Code | PSR Grade |
|------|------------|------|--------|--------|-----------|------|--------------------|-----------------------|-----------|
| Y    | 28/01/2015 |      |        | Active | Active    | 2016 | Abbotsford Virtual |                       |           |

Clicking the Y will take you into the information for the YOG change:

 A screenshot of the YOG change information form. The form has a yellow sidebar on the left with labels: Type \*, Date \*, Code, Status, Year of graduation, Grade level, Grade sub level, Entry/Exit Grade, and School > Name. The main area contains the following fields: Type \* (Y), Date \* (28/01/2015 with a calendar icon), Code (empty text box with a search icon), Status (Active), Year of graduation (2016), Grade level (11), Grade sub level (empty text box), Entry/Exit Grade (empty text box), and School > Name (Abbotsford Virtual with a search icon and a red X icon).

While the fields may be editable, you **should not** change the **Type** or **YOG** fields here. You **may** adjust the **Date** or **Code** if necessary. **Entry/Exit** Grade is **not** applicable here, so you can ignore it.

## 4.0 Demographics

Student Demographics are the fields of identifying information for a student. The fields include the date of birth, contact information, parent/guardian and sibling information, grade level, programs, alerts, citizenship, diploma information and schools they attend.

### 4.1 Student Demographics

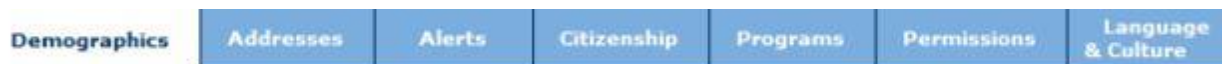
The registration wizard populates the legal and usual name, gender, preferred gender, date of birth, Year of Graduation, PSR grade, telephone number(s), address(es), homeroom and home language. Additional demographic fields can be populated after the wizard completes.

### 4.2 Main Demographics page

School or District view > Student top tab > select student > Details side tab.

The bulk of the information for a student is stored here, and along the top are several Sub-tabs where more information can be collected and stored. The information entered in the enrollment wizard will populate to the Details page. Additional information can be entered after the wizard completes.

In addition to basic student demographic information, the Demographics sub-top tab contains fields for populating additional school-level information, such as calendars, homerooms and lockers.



### 4.3 Formatting of Phone Numbers

Formatting of Phone Numbers in MyEducation BC follow a very specific format:

XXX-XXX-XXXX

Auto formatting occurs when no spaces are entered.

### 4.4 Updating Homeroom Information

Homeroom assignments can be handled for individual students by using the magnifying glass on the **Demographics** page beside the **Homeroom** field to select the appropriate homeroom. Alternatively, homerooms can be assigned by selecting a group of students and using the Mass Update or Modify List functions in MyEducation BC when in Student Top Tab where all students are listed within specific filter.

### 4.5 Parent/Guardian Information

The Contacts side tab contains the parent/guardian information. For more information, see the Contacts section.

### 4.6 Locker Assignment

Lockers can be assigned to students through the **Student top tab**:

- The **locker field** can be added to a **field set** in order to use **Modify List** functionality for populating multiple students.
- **Click** into the **Detail** side tab of a student and use the **magnifying glass** to populate the Locker field on the student's Demographics page.

## 4.7 Addresses

In the Addresses sub-top tab, both the Physical address and Mailing address for a student can be entered. If the Mailing address is the same as the Physical one, place a check in the box seen here:

### Mailing Address

Is identical



It will auto populate the physical address information. The Mailing Address field populates mailing reports and is searchable using a Query. The Proof of address field can be populated per district practice.

## 4.8 Formatting of Addresses

Addresses in MyEducation BC are actually concatenated smaller fields that must fit a specific format. When saving the address, a validation procedure will be run, and will prevent saving the information if the address does not match this format.

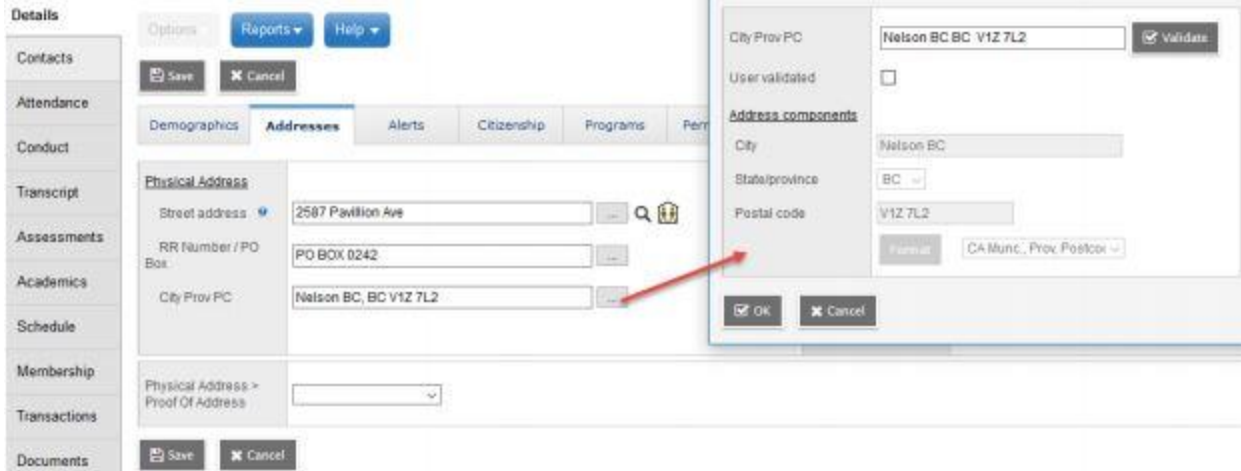
Canada Post conventions for street types have been applied to the validation of addresses, so abbreviations must be used when entering a street type. The validation tool provides a selection list for valid street types, if required.

| Address Component     | User enters . . .   |
|-----------------------|---|
| Apt/Unit/Complex      | <b>Only</b> the number or letter of the apartment, unit or complex. Do not preface the letter or number with <i>Apt, Unit, etc.</i>                     |
| Street number         | The street number of the building   |
| Street prefix         | Street prefix, if there is one.   |
| Street name           | Name of the street, without the street type   |
| Street type           | Street type as per Canada Post abbreviation conventions. Example: Rd, St, etc.  |
| Street post direction | Street direction that comes <b>after</b> the street name, if there is one. This value should be the abbreviated street direction. Example: Gordon St SE |
| Street pre direction  | Street direction that comes <b>before</b> the street name, if there is one. This value should be the abbreviated street direction. Example: N Gordon St |

The second set of fields will be for RR Number or PO Box.

The screenshot shows a user interface for managing addresses. The 'Addresses' tab is selected, showing fields for 'Physical Address' (Street address: 2587 Pavilion Ave, RR Number / PO Box: PO BOX 0242, City Prov PC: Nelson BC, BC V1Z 7L2) and 'Mailing Address' (Is Identical: checked, Street address: 2587 Pavilion Ave, RR Number / PO Box: EP CRP 0242). A modal dialog box is open for editing the 'RR Number / PO Box' field, with 'PO BOX 0242' entered. The dialog has 'OK' and 'Cancel' buttons. The interface also features a sidebar with various categories like Contacts, Attendance, and Documents, and a top navigation bar with 'Options', 'Reports', and 'Help' menus.

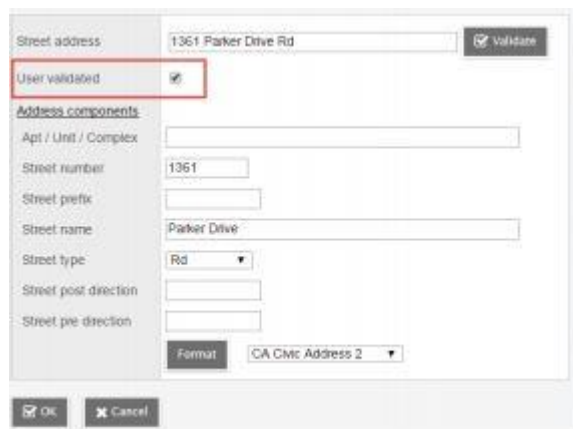
| Address component | User enters . . .  |
|-------------------|--|
| RR Number/PO Box  | <p>This field may contain: RR, PO BOX, LOT, CONC or GD information. When entering data, these fields should be entered in block caps as follows:</p> <ul style="list-style-type: none"> <li>• RR</li> <li>• PO BOX</li> <li>• LOT</li> <li>• CONC</li> <li>• GD</li> </ul> |



| Address Component | User enters . . .                                    |
|-------------------|--|
| City              | Name of the city, town, etc.                         |
| Province          | 2-Digit Provincial code, i.e., BC or YK              |
| Postal code       | Postal code in Canada Post convention format A1A 1A1 |

#### 4.9 Entering Addresses in MyEducation BC

1. Type the address into the fields given.
2. Click on the icon at the end of the address field to open up the validation window.
3. In the pop-up validation window, verify that the address components appear in the correct fields, by clicking the Validate button.
4. If a validation warning is received on entering this window, verify the address components appear in the correct fields.
  - a. The User validated override checkbox may be used if the address does not validate correctly. This will open the address fields to be populated manually



- b. Type the address components into the appropriate fields.
- c. Click **OK**, then the **Save** button.

#### 4.10 Shared Addresses

If an address is already in MyEducation BC, attached to a sibling or contact, the address can be selected from the magnifying glass picklist. Autofill suggestions may appear as the address is typed. When selected, this will automatically populate the entire address and identify it as a shared address between the student and the sibling or the selected contact. Subsequent changes to this shared address will prompt the user to choose if they want to update the address for any or all records attached to the shared address.

The “Shared Address” icon will then appear.



#### 4.11 Primary Program of Study

Programs of Study do not automatically populate in MyEducation BC, they are required for TRAX and the Graduation Reports. This field can be populated as part of the registration process.

##### 4.11.1 To add a program of study to an individual student:

1. In the **School** view, click on the **Student** top tab.
2. Find the student that requires a program of study and check the box beside their name.
3. Click the **Transcript** side tab.
4. Click the **Programs of Study** sub-side tab.
5. In the **Options** menu, select **Add**. A new window appears to enter the graduation program information.
6. Click to open the **Graduation Program** Pick List window.
7. Click the radio button to select the **appropriate** graduation program in the list.
8. Click **OK** to close the pop-up window. The selected program will now appear in the Name field. The Total credit, Diploma type, and Description fields will auto-populate.
9. Check the box for **Primary program study**.
10. Click **Save**.

#### 4.11.2 To add a Program of Study to multiple students without a Program of Study

This will add a **Program of Study** to students that currently do not have a **Program of Study**. It will not change a **Program of Study** if a student already has one assigned.

1. School view, Student top tab
2. Options, Program of Study Creator – Primary
3. Select the Program of Study to assign from the Pick List
4. Select the group of students from the drop down selection
5. Check or uncheck the 'Active Students Only' checkbox as appropriate
6. Set the Start and End Grade if you want to limit the process to specific grade levels

#### 4.11.3 To add or change a Program of Study for multiple students

In the School view, click the Global top tab.

7. Click the Favorite side tab.
8. Click the blue hyperlink on the Graduation Student Program table.
9. Update student graduation program values using modify list or mass update functions.

### 4.12 Updating Diploma/SCCP Granted Dates

Diploma/SCCP met dates may be updated *prior* to End of Year Rollover (EOYR) to confirm students who are graduating. It may also be necessary to update Diploma met dates for students who did not meet graduation requirements before EOYR, but have completed summer school courses to complete their programs.

#### 4.12.1 To enter Diploma/SCCP Granted Date for an individual student:

1. In the School view, click the Student top tab.

2. Click the Details sub-side tab and select the Demographics sub-top tab.

3. Use the date selector icon or type in the Diploma Granted Date that reflects the effective date on which the student fulfilled graduation requirements.

#### 4.12.2 To enter Diploma/SCCP Granted Date for multiple students:

1. In the School view, click the Global top tab.

2. Click the Student side tab.

3. Click the blue hyperlink on the Student table.

4. Select the field set called Diploma Granted.

5. Update Diploma granted date values using Modify List or Mass Update functions. Or, use the Pre transition field set

**Note:** If using Mass Update, ensure that the only students in the list are ones intended to update. There is no way to mass update date fields back to a blank value.

#### 4.13 Inclusions

(Not currently used in SD63) Inclusions will appear on the Permanent Student Record (PSR) report. To enter an inclusion for a student:

1. In the **School** view, click on the **Student** top tab.

2. Find the student requiring an inclusion record and check the box beside their name.

3. Click the **Transactions** side tab.

4. Click the **Inclusions** sub-side tab.

5. In the **Options** menu, select Add.

6. The **New Inclusion** page opens:

The screenshot shows a web-based form for entering a new inclusion. At the top, there are three menu buttons: 'Options', 'Reports', and 'Help'. Below these are 'Save' and 'Cancel' buttons, and a dropdown menu currently showing 'BC Default Template'. The form fields include: 'Inclusion date' (25/05/2017), 'Expiry Date' (empty), 'Inclusion type' (Inclusion 01), and 'School year' (2017). A large text area is labeled 'Comment for PSR card', and there is a 'PSR Comment' label below it. At the bottom of the form, there are 'Save' and 'Cancel' buttons.



a. In the Inclusion date field, type or use the calendar icon to select the effective date of the inclusion.

b. In the **Expiry Date field**, type or use the calendar icon to select the expiry date of the inclusion if applicable.

c. In the Inclusion type field, indicate the type of inclusion being recorded, the type **must be prefaced by the word**: Inclusion and then the number sequence (01, 02, 03). The word Inclusion and the sequence number will determine if and in what order the inclusion prints on the PSR.

d. In the School year field, use the icon to select the year the inclusion is recorded for.

e. Use the PSR Comment field to record the necessary information.

7. Click Save.

## 5.0 Student Scheduling

### 5.1 Viewing a Student Schedule

From the Student List, click in the box to the left of the student name to select the student, then click on the Schedule side tab. Users are presented with the option of either a List View or a Matrix View.

Matrix view (*used by Middle Schools*) provides a chart display of the student's schedule with days across the top and periods down the left side. The top block provides the means of selecting a school (if the student is taking courses at a secondary schools). A time frame drop-down list allows for the selection of schedule terms offered at the school (e.g. Full year, Semester 1, Semester 2, or the option of Today).

Note: Selecting today is the only option that is **tied to the School Calendar**, therefore to see where the student is, on a given date, this option must be chosen.

| School |   | Smithers Secondary  |  |
|--------|---|---|--|
| Time   |   | FY  |  |
|        | A - DayA  | B - DayB  |  |
| 1-1    | [S1] MFON-12-03<br>FOODS AND<br>NUTRITION 12<br>Ddooyhwk-<br>Gpwbw<br>502       | [S1] MFDN-12-03<br>FOODS AND NUTRITION 12<br>Ddooyhwk- Gpwbw<br>502       |  |
|        | [S2] YVRA-2CPH-02<br>PHOTOGRAPHY 12<br>Gfucob, Khrz<br>405                      | [S2] YVRA-2CPH-02<br>PHOTOGRAPHY 12<br>Gfucob, Khrz<br>405                |  |
| 2-2    | [S1] MESC-11-01<br>EARTH SCIENCE<br>11<br>Xnywhfz, Sxus<br>P6                   | [S1] MESC-11-01<br>EARTH SCIENCE 11<br>Xnywhfz, Sxus<br>P6                |  |
|        | [S2] MEN-12-02<br>ENGLISH 12<br>Sh, Mxha<br>412                                 | [S2] MEN-12-02<br>ENGLISH 12<br>Sh, Mxha<br>412                           |  |
| 3-3    | [S1] MEN-11-01<br>ENGLISH 11<br>Dwkicqf, Jngppl<br>507                          | [S1] MEN-11-01<br>ENGLISH 11<br>Dwkicqf, Jngppl<br>507                    |  |
|        | [S2] MPLAN10-07<br>PLANNING 10<br>Jptsk, Xpncw<br>104                           | [S2] MPLAN10-07<br>PLANNING 10<br>Jptsk, Xpncw<br>104                     |  |
| 4-4    | [S1] MTRA-12-01<br>DRAMA, THEATRE<br>PERFORM 12 -<br>ACTING<br>Om, Qywwm<br>411 | [S1] MTRA-12-01<br>DRAMA, THEATRE PERFORM 12 - ACTING<br>Om, Qywwm<br>411 |  |
|        | [S2] YPHR-2APHL-<br>01<br>PHILOSOPHY 12<br>Gfucob, Khrz<br>402                  | [S2] YPHR-2APHL-01<br>PHILOSOPHY 12<br>Gfucob, Khrz<br>402                |  |

The **List view** (Secondary and Elementary schools) can be helpful where a school has multiple days or periods and terms which can result in the matrix looking overly complicated.

| Course         | Description                        | GrdLvl | Term | Classr    | Teacher          | Term | Schedule | Unlocked Schedule | Description                       | Name                           | How Taken |
|----------------|------------------------------------|--------|------|-----------|------------------|------|----------|-------------------|-----------------------------------|--------------------------------|-----------|
| MBN-12-01      | FOODS AND NUTRITION 12             | 12     | 01   | 102       | Dobayunib, Opone | 01   | 1(A-B)   | 1(A-B)            | FOODS AND NUTRITION 12            | Smiths Secondary               |           |
| YVPA-20PA-02   | PHOTOGRAPHY 12                     | 12     | 02   | 425       | Onygo, Wini      | 02   | 1(A-B)   | 1(A-B)            | BA VISUAL AND PERFORMING ARTS 12C | Smiths Secondary               |           |
| MBSC-11-01     | EARTH SCIENCE 11                   | 11     | 01   | PE        | Xivvini, Senu    | 01   | 2(A-B)   | 3(1)-4(2)         | EARTH SCIENCE 11                  | Smiths Secondary               |           |
| MBN-12-02      | ENGLISH 12                         | 12     | 02   | 412       | Iru, Wini        | 02   | 2(A-B)   | 2(A-B)            | ENGLISH 12                        | Smiths Secondary               |           |
| MBN-11-01      | ENGLISH 11                         | 11     | 01   | 307       | Dekroah, Jipini  | 01   | 3(A-B)   | 3(A-B)            | ENGLISH 11                        | Smiths Secondary               |           |
| MPLAN10-01     | PLAYING 10                         | 10     | 02   | 104       | Adek, Xicor      | 02   | 3(A-B)   | 3(A-B)            | PLAYING 10                        | Smiths Secondary               |           |
| MTPA-12-01     | DRAMA THEATRE PERFORM. 12 - ACTING | 12     | 01   | 411       | Olu, Qawina      | 01   | 4(A-B)   | 4(A-B)            | THEATRE PERFORMANCE 12: ACTING    | Smiths Secondary               |           |
| YPA-20PA-01    | PHILOSOPHY 12                      | 12     | 02   | 432       | Onygo, Wini      | 02   | 4(A-B)   | 4(A-B)            | BA PHILOSOPHY AND RELIGION 12A    | Smiths Secondary               |           |
| MBN-12-DISTAL  | ENGLISH 10                         | 10     | FF   | DistanceE |                  | FF   | P1D(1)   |                   | ENGLISH 10                        | Northern BC Distance Education |           |
| XTC-12-Comment | TERM COMMENT                       | 12     | FF   | DistanceE |                  | FF   | P1D(1)   |                   | TERM COMMENT 12                   | Northern BC Distance Education |           |

## 5.2 Printing a Student Schedule

To print an individual student's schedule (**Student > Schedule > Reports > Students > Student Schedules**). Schedules can be printed as either a **Matrix BY TERM** or a **Sheet BY TERM**.

The screenshot shows the 'Student List' interface for a student named Paven Akermanis. The 'Reports' dropdown menu is open, displaying the following options:

- Scheduling Reports
- Students
- Diploma Verification
- Quick Chart
- Quick Report
- My Job Queue...

Two sub-menus are visible for the 'Students' option:

- Student Schedules (Matrix) BY TERM
- Student Schedules (Sheet) BY TERM

The main interface shows a grid of course blocks for the student. The current view is 'List view'. The grid shows the following course blocks:

- 1-1: MBI--12-02 SC - BIOLOGY 12 Jimenezsierra, Angelico 202
- 2-2: XAT--12STUD-01 STUDY BLOCK 12 Gotro, Yifet

## Student Schedules (Sheet) BY TERM

### Student Schedules (Sheet) BY TERM

|                     |   |
|---------------------|---|
| School              | Hugh Boyd Secondary   |
| Term                | <input type="text" value="Q"/>  |
| Students to include | <input type="text" value="All"/>  |
| Search value        | <input type="text"/>  |
| Effective Date      | <input type="text" value="28/11/2017"/> <input type="button" value="Calendar"/> |
| Sort students by    | <input type="text" value="Name"/>   |
| Sort schedules by   | <input type="text" value="Schedule expression"/>                                |
| Format              | <input type="text" value="Adobe Acrobat (PDF)"/>                                |

| Field               | Default                     | Description / Comment  |
|---------------------|-----------------------------|--|
| School              | Current School of the user. | The user is not able to change this value.   |
| Term                | Blank                       | Users can select a single, multiple or all terms. The number of terms presented is based on the schools structure.                           |
| Students to include | All                         | Options are <i>All, YOG, Homeroom, Guidance counselor</i> or <i>Snapshot</i>   |
| Search value        | Non-enabled                 | This field is not enabled with the above option of <i>All</i> . For all other <i>Students to include</i> values, it is a free form text box. |
| Effective Date      | Current date                | Effective date can be used if, there are schedule changes in a <i>Pending</i> state (i.e. future or past add/drops)                          |
| Sort students by    | Name                        | Options are <i>Name, YOG</i> and <i>Homeroom</i>   |
| Sort schedules by   | Schedule expression         | Options are <i>Schedule expression, Term</i> and <i>Course</i>   |
| Format              | Adobe Acrobat(PDF)          | Options are <i>Adobe Acrobat(PDF), Web Page (HTML), Microsoft Excel (XLS)</i> and <i>Comma separated values (CSV)</i>                        |

### 5.3 Printing Multiple Student Schedules

Printing more than a single student's schedule is done from Schedule top tab > Master side tab > Reports > Scheduling Reports > Student Schedules (Matrix) or (Sheet) BY TERM. All - generates student schedules for all students in the school

## 5.4 Workspace

It is in the Workspace that a student's schedule is managed; courses are added, dropped and the schedule posted. To adjust a student's schedule, go to Student > Schedule > Workspace. Users have the option of a List view or a Matrix view.

MyEducation BC offers the ability to enter course requests in the current year and use the **Reschedule** functionality to determine the best placement of course sections. Reschedule considers the load rules when determining the best placement. Changes made with the Reschedule function are not permanent until posted.

Course sections can also be directly selected and manually scheduled, using the Matrix view. Where the latter method is used, an Update option is provided to pull the courses from the student schedule matrix into the Course Requests.

Where schools have selected Allow future add/drop as a School > Set up > Preference under the Category > Schedule, users will be able to set future dates for a student's schedule change to take effect. Although enrollment totals will display a current enrollment number, the application will include these future changes when applying maximum enrollments.

### 5.4.1 Matrix View

The matrix view divides the screen into two sections, the schedule matrix on the right and course requests on the left. From the List View, click the hyperlinked Matrix View found at the top right of the screen.

The screenshot shows the 'Workspace' interface in MyEducation BC. The left sidebar contains 'Course Requests' with a list of courses like 'MAF-11 ART FOUNDATIONS 11' and 'MEN-11 ENGLISH 11'. Below this are 'Schedules from other schools' and 'Pending Student Schedule Changes'. The main area is titled 'View and make changes as of 12/12/2016' and shows a 'Student Schedule (25% scheduled - Class credits: 24.0)'. A table with columns A and B and rows 1-14 displays course sections. For example, row 1 shows 'XSPBK1A0T-01 SUPERVISED STUDY' in column A and 'XSPBK1A0T-01 SUPERVISED STUDY' in column B. At the bottom, there are buttons for 'Add', 'Drop All', 'Add All', 'Reschedule', 'Post', and 'Revert'.

#### 5.4.1.1 Matrix View: Course Requests – Left Side

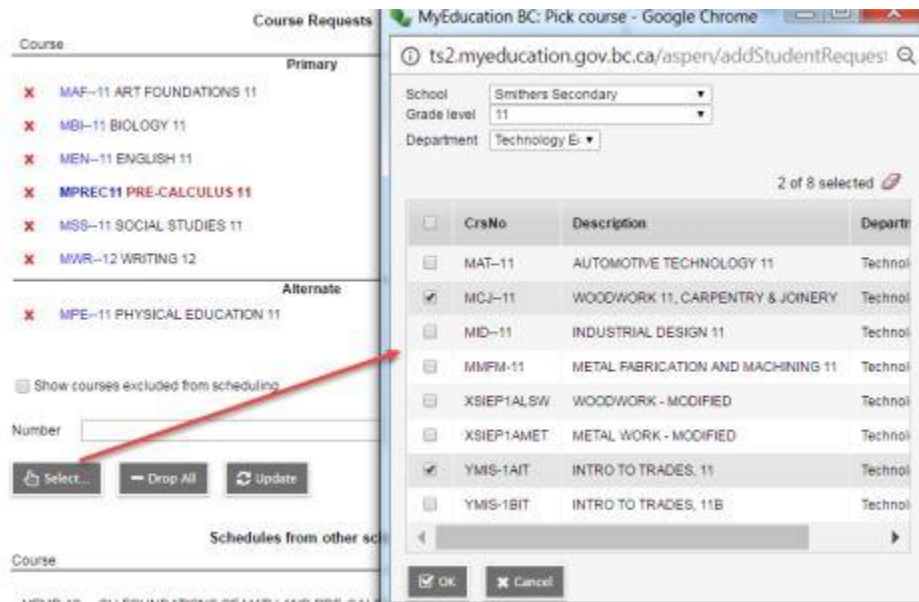
Primary requests are displayed at the top of the left side of the screen.

- Requests can be entered in the Number field by typing the course codes separated by a comma and then clicking the Add button.



Number

- The Select button opens a pick list of courses to choose from. Multiple selections can be made using this method.



Course Requests

Course

Primary

- MAF--11 ART FOUNDATIONS 11
- MBI--11 BIOLOGY 11
- MEN--11 ENGLISH 11
- MPREC11 PRE-CALCULUS 11
- MSS--11 SOCIAL STUDIES 11
- MWR--12 WRITING 12

Alternate

- MPE--11 PHYSICAL EDUCATION 11

Show courses excluded from scheduling

Number

Schedules from other schools

MyEducation BC: Pick course - Google Chrome

ts2.myeducation.gov.bc.ca/asper/addStudentRequest

School: Smithers Secondary

Grade level: 11

Department: Technology Education

2 of 8 selected

| <input type="checkbox"/>            | CrsNo      | Description                        | Depart  |
|-------------------------------------|------------|------------------------------------|---------|
| <input type="checkbox"/>            | MAT--11    | AUTOMOTIVE TECHNOLOGY 11           | Technol |
| <input checked="" type="checkbox"/> | MCJ--11    | WOODWORK 11, CARPENTRY & JOINERY   | Technol |
| <input type="checkbox"/>            | MID--11    | INDUSTRIAL DESIGN 11               | Technol |
| <input type="checkbox"/>            | MMFM-11    | METAL FABRICATION AND MACHINING 11 | Technol |
| <input type="checkbox"/>            | XSIEP1ALSW | WOODWORK - MODIFIED                | Technol |
| <input type="checkbox"/>            | XSIEP1AMET | METAL WORK - MODIFIED              | Technol |
| <input checked="" type="checkbox"/> | YMIS-1AIT  | INTRO TO TRADES, 11                | Technol |
| <input type="checkbox"/>            | YMIS-1BIT  | INTRO TO TRADES, 11B               | Technol |

- **Drop All** will remove all course requests.
- **Update button** adds course request for sections directly into the schedule matrix.
- Primary requests displayed at the top left of the screen provide a variety of active functions for the student schedule builder.

Hovering over a request with the mouse, highlights where in the matrix sections of the course are offered. Course requests can then be **dragged and dropped** into those areas. It is best to click on the course description rather than the course code so as to avoid opening the course details popup. See Work Mode below for settings related to drag- and-drop functionality.

The screenshot displays a software interface for managing course requests and schedules. On the left, under 'Course Requests', there is a list of courses. The course 'MATH PRE-CALCULUS 11' is highlighted in red. On the right, the 'Student Schedule' shows a grid with columns A and B. The grid contains several rows of course information. Red 'X' icons are visible in the grid, indicating that certain requests have been deleted. Red arrows point from the 'MATH PRE-CALCULUS 11' request to the corresponding slots in the schedule grid.

A red **X** provides for the deletion of an individual request.

Clicking on the blue hyperlinked course code opens course request attributes. In order for the course to be considered in the Inclusion count, the request must be marked as an **inclusion** request in the window.

Course descriptions displayed in **bold red** indicate course requests that have **not** been scheduled.

The **Allow over max** check box provides the user the ability to override the course maximum enrollment setting for scheduling the request.

- **Alternate**- Alternates are determined by dragging primary requests into this area. Should a request populate this area, it can be dragged into the primary request field or deleted altogether using the red X.
- **Secondary** requests are those courses students are taking from another school. These fields are only displayed where a student is enrolled in a course from a secondary school.

### 5.4.2 Matrix View: Schedule Matrix - Right Side

**View and make changes as of**

[<< List view](#)

**Student Schedule (33% scheduled - Class credits: 16.0)**

---

Term code:  Work mode:  Allow conflicts:  Allow all over max:  Allow over inclusion count:

|   | 1  | 2   |
|---|--|---|
| 1 | MPLAN10CS-01<br>CS - PLANNING 10<br>Bassendowski, K<br>117                       | MPLAN10CS-01<br>CS - PLANNING 10<br>Bassendowski, K<br>117                |
| 2 | MAWM-11CS-01<br>CS - APPRENTICESHIP AND WORKPLACE MATH 11<br>Sorourfar, K<br>118 |   |
| 3 |  |   |
| 4 | MVAMT12CS-04<br>CS - VISUAL ARTS: MEDIA ARTS 12<br>Bassendowski, K<br>117        | MVAMT12CS-04<br>CS - VISUAL ARTS: MEDIA ARTS 12<br>Bassendowski, K<br>117 |
| 5 |  | MGT-----01<br>GRADUATION TRANSITIONS<br>Schiebel, Z<br>Main               |
| 6 |  |   |

Course:    Ignore warnings

- **Percent scheduled - Class credits** shows the percentage of the schedule that has sections scheduled. . **This can be misleading** where there are periods outside of the “regular” day as is the case in the example above. The system includes all periods in the timetable and calculates the percent accordingly. Set the Term code to FY for the Class credits to display all of the classes scheduled at the primary school. If courses appear missing based on the credit count, this is due to those being calculated from courses taken at secondary schools. The List view is more suited to the display of all courses from all schools.

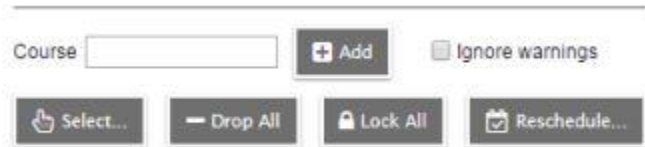
- **Term Code** can be changed to view the schedule by term, semester, or full year (FY). Setting to FY will include all of the terms as well as full year providing a more comprehensive view.

- **Work Mode** by default is set to manual. This allows for the drag-and-drop of course requests into open periods of the student schedule. Change to Auto-Shuffle to drag a course from the left and drop on a space that is already scheduled, bumping out the first class and returning it to the Request list where it will display in red.

- **Checkbox** for Allow Conflicts, if selected, will allow more than one course to be placed in the same period on the matrix. This can be used temporarily in trying to work out the schedule. In DL or Alternate schools, this would provide the “Flex Ed” ability of entering multiple classes in a single period.

- **Allow All Over Max** checkbox will allow classes to be scheduled that have reached maximum enrollment.

- **Allow over inclusion count** this will only appear if an Inclusion count has been defined. This is done from the Schedule tt > Preferences st > Category=Scenario-basic > Control inclusion students. Checking this box will allow you to ignore the value defined in this preference.
- Each period on the matrix displays the scheduled class and two symbols, a red X to drop the class and a **Padlock** to lock the class so that it can't be moved when **Reschedule** is used.
- **Course** (think section) text entry box under the lower left side of the matrix allows direct entry of course section numbers separated by commas. This field is case sensitive and must include the correct code with section number. Once entered, click Add.



- Ignore Warning checkbox allows a class to be scheduled despite a conflict.
- Drop All button drops all classes from the schedule.
- Lock All locks all classes currently on the schedule.
- The Reschedule button will generate a schedule based on the Course Request list and class availability. See Appendix A for further information on using Reschedule and addressing validation errors.
- Changes within the matrix can be made dynamically. Clicking in an empty space automatically opens the Schedule Master Pick List with the Period filter defaulting to the period clicked.
- Post and Revert buttons are located on the lower right corner of the screen. After sections have been dropped and changed, the Revert button can be used to restore the schedule to the last posted version. When satisfied with the schedule, click Post to commit the schedule.
- Where a transcript already exists for a student, moving to a new section of the course will trigger the Update transcripts to new section popup shown below. This allows the user an option to merge the transcript record for the new course section with the

| Course    | Section  | Instructor      | Term | Schedule | Version/Section | Total | Max | Class Size |
|-----------|----------|-----------------|------|----------|-----------------|-------|-----|------------|
| MAC-11-01 | 04685767 | Phyllis Sand    | 02   | NAB      | 1/1/2018        | 19    | 25  | 1          |
| MAC-11-02 | 04685767 | Blawie Pflue    | 02   | NAB      | 1/1/2018        | 26    | 28  | 1          |
| MEN-11-02 | 04685767 | Davidson, David | 02   | NAB      | 1/1/2018        | 28    | 30  | 1          |
| MB-11-01  | 04685767 | Davidson, David | 02   | NAB      | 1/1/2018        | 21    | 25  | 1          |



Course sections can be dragged from one period to another open period.

Printer Friendly Version

View and make changes as of 12/12/2016

<< List view

Student Schedule (21% scheduled - Class credits: 24.0)

Term code: S1      Work mode: Manual      Allow conflicts:       Allow all over max:

|   | A   | B   |
|---|---|---|
| 1 |   | MEN--11-01<br>ENGLISH 11<br>Dwkrqgh, J<br>507       |
| 2 | MSS--11-02<br>SOCIAL STUDIES 11<br>Fqtfjg, W<br>509 | MSS--11-02<br>SOCIAL STUDIES 11<br>Fqtfjg, W<br>509 |
| 3 |   | MEN--11-01<br>ENGLISH 11<br>Dwkrqgh, J<br>507       |
| 4 | MAF--11-02<br>ART FOUNDATIONS 11<br>Mouw, U<br>101  | MAF--11-02<br>ART FOUNDATIONS 11<br>Mouw, U<br>101  |
| 5 |   |   |
| 6 |   |   |

Where changes have been made, an asterisk (\*) will display beside the course code indicating that the current schedule has not been posted and committed.

|   | A   |
|---|---|
| 1 | MCH--11-03*<br>CHEMISTRY 11<br>Ebmcrcbaf, R<br>407  |
| 2 | MSS--11-02<br>SOCIAL STUDIES 11<br>Fqtfjg, W<br>509 |
| 3 | MEN--11-01<br>ENGLISH 11<br>Dwkrqgh, J<br>507       |
| 4 | MAF--11-02<br>ART FOUNDATIONS 11<br>Mouw, U<br>101  |

- **Post** and **Revert** buttons are located on the lower right corner of the screen. After sections have been dropped and changed, the Revert button can be used to restore the schedule to the last posted version. When satisfied with the schedule, click Post to commit the schedule.

- Where a transcript already exists for a student, moving to a new section of the course will trigger the **Update transcripts to new section** popup shown below. This allows the user an option to merge the transcript record for the new course section with the one already created; thereby avoiding a second record for the same course.

**Update transcripts to new section**

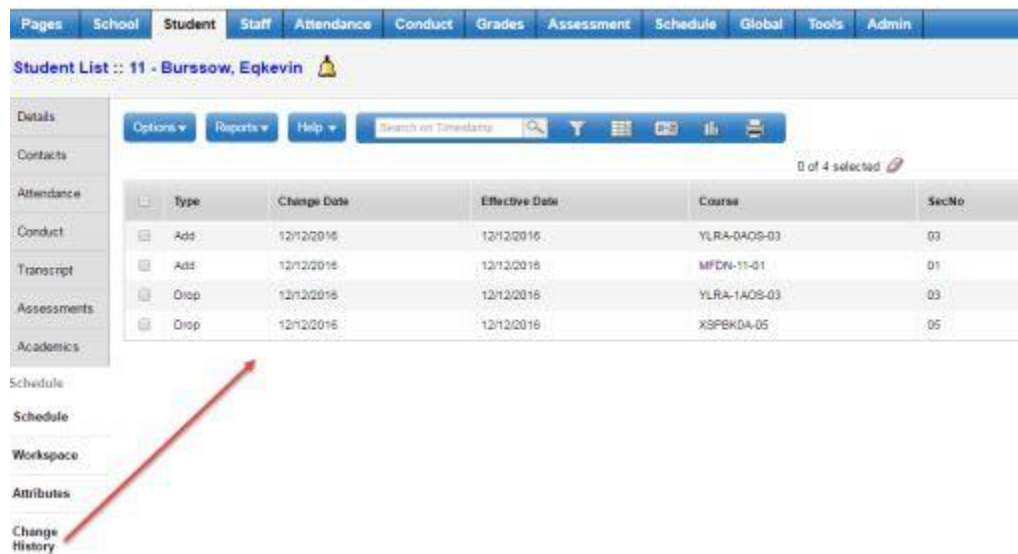
| Current transcript record | New transcript record | Update                   |
|---------------------------|-----------------------|--------------------------|
| MEN--12-03 ENGLISH 12     | MEN--12-02 ENGLISH 12 | <input type="checkbox"/> |

After the new transcript is created, schools can use the **Update Gradebook** function to move selected information in the grade and date transcript columns of the new transcript record into the Gradebook and Grade Input screens of the new course section. **Grades > Transcript > select Transcript(s) > Options > Show selected > Options > Update Gradebooks**

## 5.5 Additional Scheduling Tools

### 5.5.1 Change History

Change History is found from Student > Schedule > Change History. A record of posted schedule changes is displayed showing what was changed, when, where and by whom. **Note** that these records can be deleted.



The screenshot shows the 'Student List' for student '11 - Burssow, Eriquevin'. The interface includes a top navigation bar with tabs like 'Pages', 'School', 'Student', 'Staff', 'Attendance', 'Conduct', 'Grades', 'Assessment', 'Schedule', 'Global', 'Tools', and 'Admin'. Below the navigation, there are buttons for 'Options', 'Reports', and 'Help', along with a search bar and icons for filtering and printing. A table displays schedule change history with columns for 'Type', 'Change Date', 'Effective Date', 'Course', and 'SecNo'. A red arrow points to the 'Change History' link in the left sidebar.

| Type | Change Date | Effective Date | Course       | SecNo |
|------|-------------|----------------|--------------|-------|
| Add  | 12/12/2016  | 12/12/2016     | YLRA-0A08-03 | 03    |
| Add  | 12/12/2016  | 12/12/2016     | MFDN-11-01   | 01    |
| Drop | 12/12/2016  | 12/12/2016     | YLRA-1A08-03 | 03    |
| Drop | 12/12/2016  | 12/12/2016     | XSPBK04-05   | 05    |

### 5.5.2 Colour Coded Departments

Departments can be colour coded so that those viewing a student's schedule in the matrix view can more easily distinguish classes of a given department.

**These colours can be assigned from the Schedule top tab > Courses > Department Codes.**

Pages School Student Staff Attendance Conduct Grades Assessment Schedule Global Tools Admin

### Department Color Assignment

Master Schedules

Options Reports Help Save

Courses

Courses

Department Codes

Rooms

Structure

Schedule Attributes

Rules

Academic Tracks

Recommendation Controls

Preferences

| Department Code     | Color        |
|---------------------|--------------|
| Applied Skills      | Red          |
| Career Preparation  | Light Red    |
| Career Programs     | Light Orange |
| English             | Orange       |
| Fine Arts           | Blue         |
| Health and Career   | Light Pink   |
| Home Economics      | Light Green  |
| Humanities          | Light Orange |
| Independent Studies | Light Blue   |
| Information Tech    | Purple       |
| Language Arts       | Light Orange |
| Languages           | Light Blue   |
| Mathematics         | Pink         |
| Other               | Light Blue   |
| Physical Education  | Light Green  |

Classes will be displayed in the student's schedule > matrix view, in the department selected colours.

### 5.5.3 Conflicts

The Conflicts sub-side tab provides a view only matrix which shows sections offered, with those scheduled highlighted in blue. The Comment field will indicate if a course request was not fulfilled. Clicking on a scheduled period will display the Schedule Master Pick List for that section with enrollment totals and max. This does not take into account Classes groupings.

Student Schedule (29% scheduled - Class credits: 32/8)

| Course   | Periods                        |                                |                                |
|--|--------------------------------|--------------------------------|--------------------------------|
|  | 1                              | 2                              | 3                              |
| MAT-11<br>AUTOMOTIVE TECHNOLOGY 11               |                                |                                |                                |
| MATH-11<br>MATH 11: APPRENTICESHIP AND WORKPLACE |                                | S:02<br>(S:2)                  | O:01<br>(O:1)                  |
| MCH-11<br>CHEMISTRY 11                           | O:03<br>(O:3)<br>C:01<br>(C:1) |                                | O:02<br>(O:2)                  |
| MCOM-11P<br>COMMUNICATIONS 11 - FOCUS            |                                | S:01<br>(S:1)                  |                                |
| MESC-11F<br>EARTH SCIENCE 11 - FOCUS             | S:01<br>(S:1)                  |                                |                                |
| MSS-11<br>SOCIAL STUDIES 11                      | O:03<br>(O:3)                  | C:02<br>(C:2)<br>O:05<br>(O:5) | O:04<br>(O:4)<br>O:01<br>(O:1) |
| MWEX-2AF<br>WORK EXPERIENCE 12A - FOCUS          |                                |                                | S:01<br>(S:1)                  |
| MWEX-2BF<br>WORK EXPERIENCE 12B - FOCUS          |                                |                                | S:01<br>(S:1)                  |

Schedule Master Pick List - Google Chrome

Course: MSG-11 OK

Period: A

Track ID: All

Term: All

Department: All

Grade Level: All

Team: All

House: All

Playbook: All

Order by: Course

Requested only

Valid sections only

Allow conflicts

Allow all over max

| Course    | Description       | Teacher       | Term | Schedule | Unrelated Schedule | Total | Max | Closed at max? | Se              |
|-----------|-------------------|---------------|------|----------|--------------------|-------|-----|----------------|-----------------|
| MSG-11-01 | SOCIAL STUDIES 11 | Fedfg/Wuocdps | S1   | 4(A-B)   | 4(A-B)             | 30    | 30  | Y              | 0 of 1 selected |

## 5.5.4 Reschedule

The **Reschedule** functionality assesses the *master schedule structure* and *enrollments* in order to find a “best fit” for the student. In doing so, if any aspect of the schedule structure is not complete or if the expression and matrix are out of synch, the result will be validation errors. Building a school schedule in MyEducation BC using the builder will minimize the likelihood of these errors.

The screenshot displays the MyEducation BC interface for a student named Elizabeth Abdalla. The main section shows the 'Student Schedule (29% scheduled - Class credits: 32.0)'. Below this, there are sections for 'Requests', 'Pending Student Schedule Changes', and 'Course Requests'. A red 'X' icon and a message box indicate 'You have validation errors.' A red arrow points from the 'Messages' button in the 'Pending Student Schedule Changes' section to the error message box. The error message box contains several messages, including 'Field Master - teacher cannot be blank' and 'Errors happens while retrieving Master Teacher data'.

| Course           | Description                             | Term | Schedule   | Unrotated Schedule | Teacher       | Classr | SecType | Team | House | Platoon | Inclusi |
|------------------|---|------|------------|--------------------|---------------|--------|---------|------|-------|---------|---------|
| MFR-10-01        | FRENCH 10                               | S1   | P1(D1-02)  |                    | Ogiml Xaojd   | R405   |         |      | GR 10 |         | Y       |
| MFWP-10-05       | FOUNDATIONS OF MATH AND PRE-CALCULUS 10 | S2   | P1(D1-02)  |                    | VJQpf, lauz   | R303   |         |      | GR 10 |         | Y       |
| XAT-11(D)BLNK-24 | ASSIGNED TIME 11                        | FY   | P17(D1-02) |                    | Xibemwq, Sati | AUD    |         |      | GR 11 |         | Y       |
| MPE-10-01        | PHYSICAL EDUCATION 10                   | S1   | P2(D1-02)  |                    | Eudrlg Ust00  | Gym3   |         |      | GR 10 |         | Y       |
| MPLAN10-02       | PLANNING 10                             | S2   | P2(D1-02)  |                    |               |        |         |      | GR 10 |         | Y       |
| MELR-12-01       | ELECTRONICS 12 ROBOTICS                 | S1   | P3(D1-02)  |                    |               |        |         |      | GR 12 |         | Y       |
| MSS-10-04        | SOCIAL STUDIES 10                       | S2   | P3(D1-02)  |                    |               |        |         |      | GR 10 |         | Y       |
| MSC-10-03        | SCIENCE 10                              | S1   | P4(D1-02)  |                    |               |        |         |      | GR 10 |         | Y       |

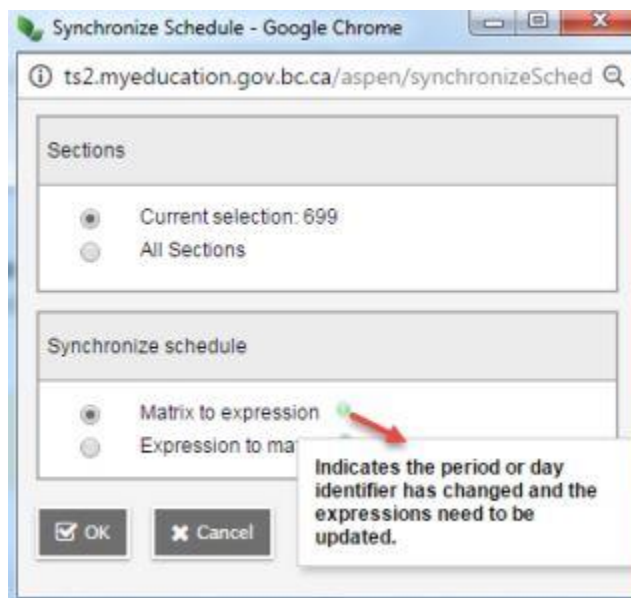
| Type                | Effective Date | Course | Description | Term | Schedule | Teacher |
|---------------------|----------------|--------|-------------|------|----------|---------|
| No matching records |                |        |             |      |          |         |

| Number  | Description                             | SecType | SecNo | TPYView | Periods per cycle | Staff > Name | TermCode | TermContent | Alternate? | AltPti | Inclusion? | All 1 > CreNo |
|---------|---|---------|-------|---------|-------------------|--------------|----------|-------------|------------|--------|------------|---------------|
| MELR-12 | ELECTRONICS 12 ROBOTICS                 |         |       | 1/2     | 2.0000            |              |          |             | N          | 0      | N          |               |
| MEN-10  | ENGLISH 10                              |         |       | 1/2     | 2.0000            |              |          |             | N          | 0      | N          |               |
| MFWP-10 | FOUNDATIONS OF MATH AND PRE-CALCULUS 10 |         |       | 1/2     | 2.0000            |              |          |             | N          | 0      | N          |               |
| MFR-10  | FRENCH 10                               |         |       | 1/2     | 2.0000            |              |          |             | N          | 0      | N          |               |
| MPE-10  | PHYSICAL EDUCATION 10                   |         |       | 1/2     | 2.0000            |              |          |             | N          | 0      | N          |               |
| MPLAN10 | PLANNING 10                             |         |       | 1/2     | 2.0000            |              |          |             | N          | 0      | N          |               |
| MSS-10  | SCIENCE 10                              |         |       | 1/2     | 2.0000            |              |          |             | N          | 0      | N          |               |
| MSS-10  | SOCIAL STUDIES 10                       |         |       | 1/2     | 2.0000            |              |          |             | N          | 0      | N          |               |

Should there be validation errors, click on Messages to view the validation errors. Helpful filters:

From Schedule > Master two filters are provided to assist schedulers in identifying areas that may interfere with the use of using the Reschedule functionality as well as those affecting structural integrity of the schedule.

- **Schedule Validation** - This filter provides a list of sections missing a schedule term or schedule expression.
- **Schedule expression out of synch with matrix** - This filter provides a list of courses for which the schedule expression and matrix are out of synch. From the Schedule > Master use Options > Synchronize Schedule. The popup parameter window allows the user to choose the Current selection from the list or all sections. Depending on whether the matrix is correct and the schedule expression is wrong, or whether the expression is correct and the matrix is not, will determine which option to select for Synchronize schedule. Hovering the mouse over the green exclamation mark to the right of the option



Some common validation errors include:

- Teacher cannot be blank: assign a teacher to the section
- Teacher is not a valid teacher: teacher must have include in scheduling (Staff > Schedule > Attributes)
- Schedule expression out of synch with matrix: use filter of same name from Schedule > Master to find course sections for correction
- Schedule bitmap is empty or invalid: use Schedule Validation filter from Schedule > Master to identify sections in need of attention

**Note: Student schedules can be manually entered and Posted without using the Reschedule procedure.**

## 6.0 Daily Attendance

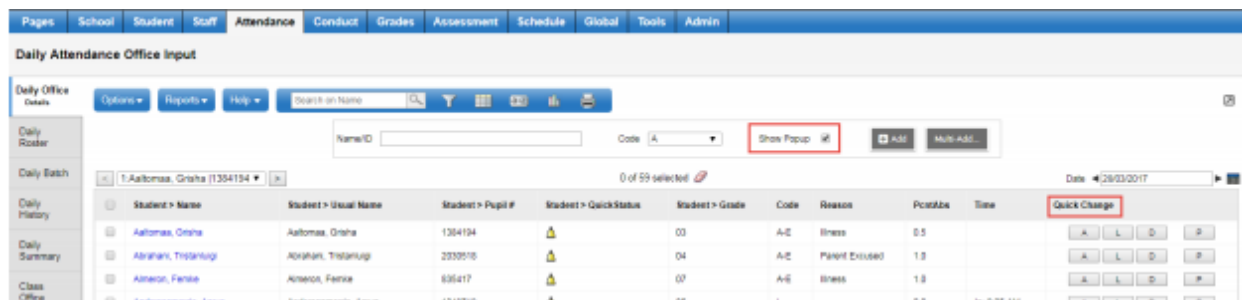
Each side tab in the Attendance top tab has different action items under the Options menu and different reports available in the Reports menu based on the information presented in the side tab.

### 6.1 Creating or Editing a Student Daily Attendance Value

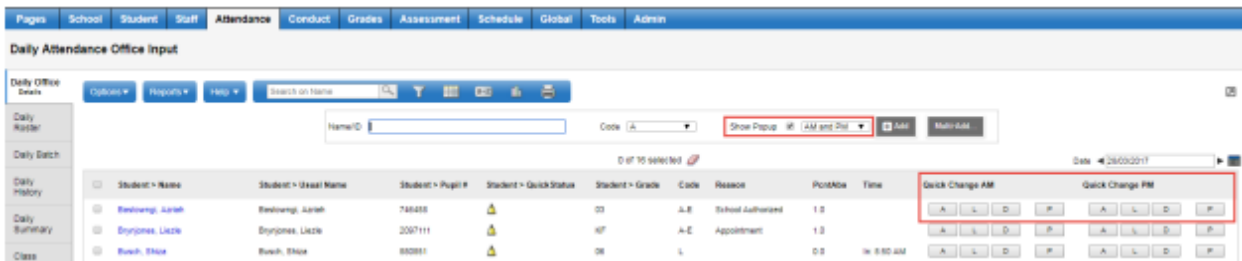
#### 6.1.1 Daily Office Side Tab

School > Attendance > Daily Office

This screen shows **All Daily Attendance** records entered for **the date selected** in the Date field at the top right of the screen. New Daily Attendance records can be entered, or existing Daily Attendance can be edited using the details the school would like to track. The Daily Office side tab allows you to enter a Daily Attendance value for students as a guardian calls the school, or as the student arrives or is dismissed from school. School > Attendance > Daily Office in a Once Daily Attendance School



School > Attendance > Daily Office in a Twice Daily Attendance School



#### 6.1.1.1 Entering a Daily Absence, Daily Late or daily Dismissal value from the Daily Office Side Tab for an individual student

To enter a Daily Attendance record for an individual:

- Select or confirm the date in the top right of the screen.
- **Name/ID** - enter the student's name, last name first, or Pupil #
  - ♣The system will select the best match based on the information entered. Ensure the correct student is selected.
  - ♣Or, the Add button below provides a list of students to select from
- **Code** – The code determines the type of Daily Attendance record created. Select a code here for basic entry, or add the code in the popup **Reason code** entry screen to provide more detailed information using Show Popup.

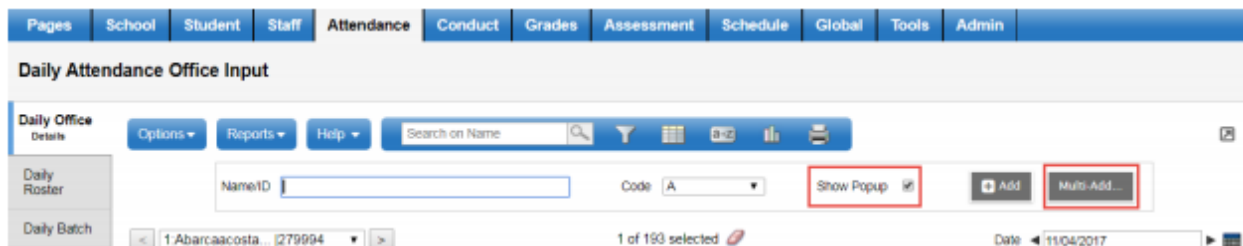
- ♣ **A** – Absent;
- ♣ **A-E** – Absent Excused;
- ♣ **L** – Late;
- ♣ **D** – Dismissed o AUTH – Authorized
- ♣ **ISS** – In School Suspension
- ♣ **OSS** – Out of School Suspension

- **Show Popup** – presents a popup window for the Reason code entry screen.
- **Add** - will pop up a list of all active students in your school to select a student (instead of entering the Name/ID above)
- **Multi-Add** – Select multiple students. Detailed instructions below.

**Note:** If you did not check the Show popup box, your student will appear in the list of students on this page with the code selected in the attendance Code column. Additional information can be entered using the Show Popup checkbox at the time of entry or by clicking into the record after it is entered and filling in the details.

#### 6.1.1.2 Entering Daily Attendance Records for Multiple Students at the Same Time

MyEducation BC allows you to record Attendance records for multiple students at the same time for one day or multiple days in the same way attendance is entered for individual students. Follow the steps above selecting the Show Popup checkbox and the **Multi-Add button**.



Click the **Multi-Add** button to get the Attendance Record details popup.

**Students** provides options to select the students:

- **Section** – All students in a selected course section
- **Homeroom** – All students in a selected homeroom
- **Query** – All students in a saved query
- **Snapshot** – All students in a saved snapshot
- **Selection** - Select specific students from the school Duplicate Records provides options for how the system handles a record if one already exists for a student on that date.
- **Skip** – will not overwrite the existing daily attendance record

- **Replace** – will overwrite the existing daily attendance record with the new information

**Date** – enter the date of the absence

**Multiple Dates** >> a blue hyperlink toggle that presents a Start Date and End Date field if the absence spans more than one date

**Single Date** >> a blue hyperlink toggle that returns the popup to a single Date field

**Portion Absent** – dropdown list for options to indicate the absence is not a full day the remaining selection options will present as one choice in a once daily attendance school or as AM Attendance and PM Attendance in a twice daily school and can be filled in as appropriate.

Once Daily school setup:

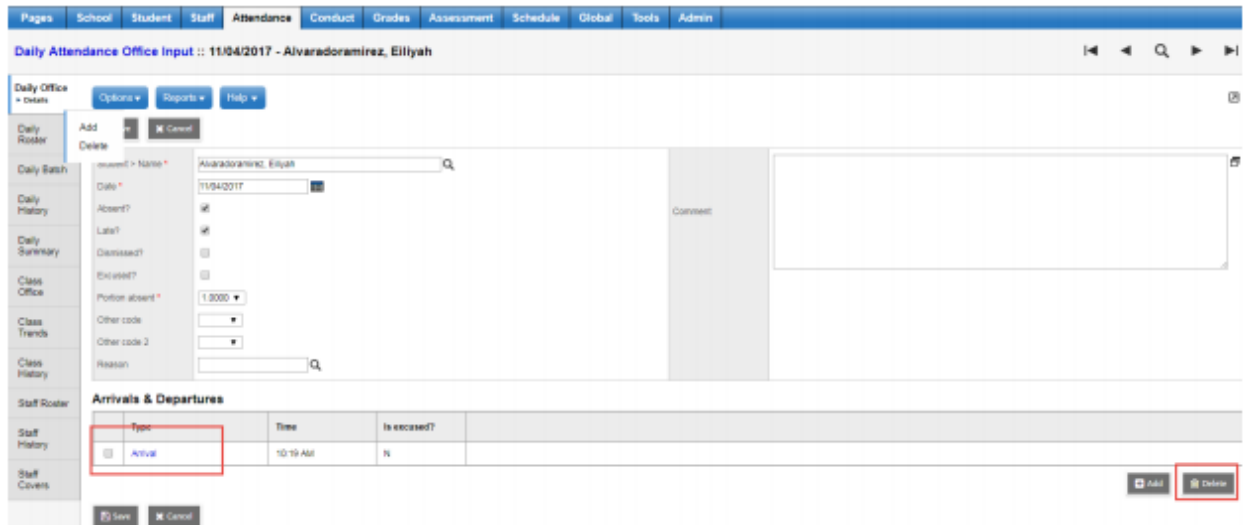


The screenshot shows a web-based interface for modifying attendance records. At the top, there are two sections: 'Students' and 'Duplicate Records'. The 'Students' section has radio buttons for 'Section', 'Homeroom', 'Query', 'Snapshot', and 'Selection'. The 'Duplicate Records' section has radio buttons for 'Skip' and 'Replace'. Below these is a 'Selected students: 0' indicator. The main form area contains fields for 'Date' (set to 25/07/2017), 'Portion' (set to 1.0000), 'Absent?' (checked), 'Late?' (unchecked), 'Dismissed?' (unchecked), 'Excused?' (unchecked), 'Other codes' (two dropdown menus), 'Reason' (a search-enabled text input), and 'Comment' (a text area). At the bottom are 'Save' and 'Cancel' buttons.

### *6.1.1.3 Modifying Attendance Records from the Daily Office Side Tab*

Select the **date** on the top right of the screen and click the **blue, hyperlinked name** of the student with the **Daily Attendance record** to be modified. Change, add or remove any information as required for accuracy, or delete the entire record using Options > Delete. The Arrivals and Departures section can be edited by clicking into the blue hyperlinked details of the entry or using the Add or Delete buttons.

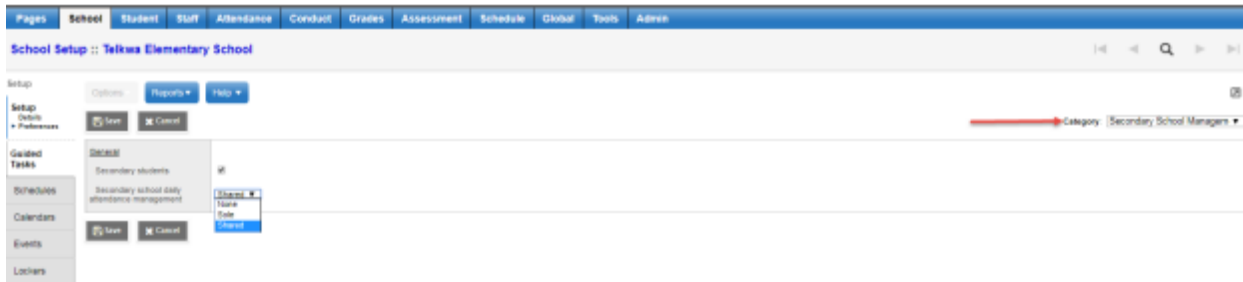




#### 6.1.1.4 Secondary School Management

Secondary School Management handles how your school works with **Cross-Enrolled** students. These settings will allow students to show in your **All Active Students** and **All Students** filters. They also control which school has the ability to create or own a Daily Attendance record.

School > Setup > Preferences > Secondary School Management



- **Secondary Students**

- ♣ **Checked** - will include students with secondary associations to your school in the Active Students and related filters along with the students' primary to your school. This is the recommended setting in BC for full functionality.

- ♣ **Unchecked** – will not include students with secondary associations to your school in the Active Students and related filters. Secondary students will show in All Students.

- **Secondary School Management** - pull-down menu determines which school can take and manage Daily Attendance.

- ♣ **None** – Only the Primary School can create and manage the Daily Attendance record.

- ♣ **Sole** – Only the Secondary school can create and manage the Daily Attendance record.

- ♣ **Shared** – Either the Primary or any of the student's Secondary schools can create the

Daily record; however once a record is created on a day only the school that created it can modify it at any point.

**Note:** This pull-down menu **ONLY** affects Daily Attendance. Class attendance for any course section can be edited by any one of the students Primary or Secondary schools.

## 7.0 Class Attendance

Class attendance and Daily attendance are **separate functions** in **MyEducation BC**. An entry can be created for individual Classes, and one entry created for a Daily attendance value on a given day.

If a School creates Daily value for a student in addition to class values, school Preference settings will determine the way a Daily attendance value is created. A Daily value can be created by the posting of one or more Class values, or through the Class to Daily Attendance Procedure.

With Class based attendance, **MyEducation BC** is set up to record one attendance record per student per class.

- The **class attendance** record stores the date, the code and whether the late, dismissed, or excused checkboxes were selected.
- The arrival and departure times.

Class Attendance in **MyEducation BC** can be recorded through the **School Office** view or through the **Teacher Staff** view:

- **School view** > Attendance > Class Office
- **Staff view** > Class Attendance

The School Setup and Staff Class Attendance input vary slightly depending on the method of Class Attendance selected.

The School Class Office entry is done in the same way regardless of the method of class attendance selected.

Schools must be setup with an **active** schedule and days assigned if using course sections in the calendar.

**Class attendance** will track which individual classes or course sections your students attended. Class attendance can be taken in each course section scheduled in a day. (ATT—AM)

- Once a day by an identified course section - ATT—AM

### 7.1 Creating or Editing a Student [Class Attendance Value](#)

Class attendance can create a Daily attendance value for a student based on School Preference settings:

- The initial posting of one selected period class attendance creates a daily attendance value for the student. After the initial class posting, subsequent changes to the daily value can be adjusted by the office as needed.

- **Class to Daily** (*Secondary schools*) attendance procedure creates a daily value for a student based on the class value entered in each scheduled class if one is not created through a class posting. The daily value for the student will be visible on the following day.

- ♣ This procedure will increase the daily value based on class attendance, it will not reduce the daily value based on class attendance. Reduction to a daily value can be adjusted by the office as needed.

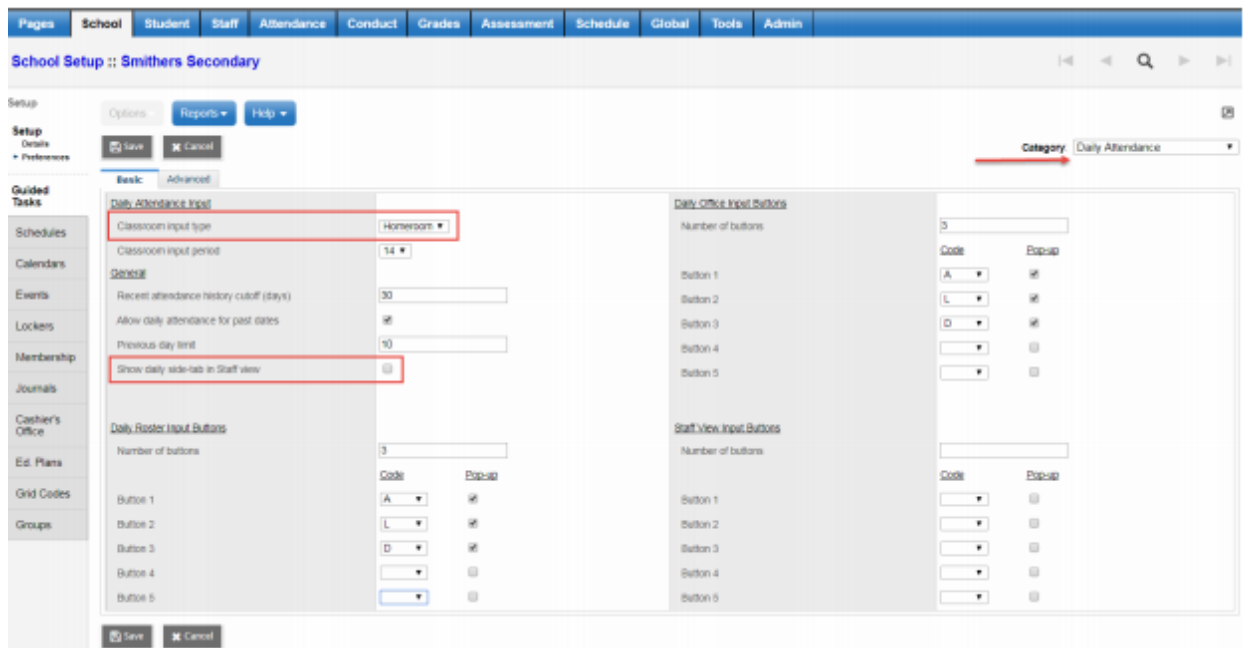
Attendance setup for your school is done from the School top tab > Setup side tab > Preferences leaf. Both the Daily Attendance and Period Attendance dropdowns will have preference settings for class attendance.

### 7.1.1 Daily and Class Office Side Tab

Daily Attendance Preferences School top tab > Setup side tab > Preferences > Category dropdown: Daily Attendance > Basic. These two settings must be set and are **generally set at the SBO by the L1**: (*please contact District L1 if you think changes need to be made to any of the fields identified below. Please do not make these changes yourself*)

- **Classroom Input Type to Homeroom** - This setting prevents a daily value from being created by a period class attendance posting.

- **Show Daily Side tab in Staff view** to unchecked - Daily values and Class values are separate, this should only be checked in schools where the teacher is creating a daily value based on students in the homeroom. If the Daily side tab is visible in Staff view a Daily value can be posted for the students listed, overwriting any entry made by the office.



If the School Office is entering a Daily attendance value the following Daily Attendance preferences can also be set.

- Classroom Input Period: N/A

- Recent attendance history cut-off – the number of days of attendance history shown in the Recent Attendance filter.
- Allow daily attendance for past dates – N/A
- Previous day limit – N/A • Daily Roster Input Buttons – select the number and type of buttons visible in the School > Attendance > Daily Roster side tab if used.
- Daily Office Input Buttons – select the number and type of buttons visible in the School > Attendance > Daily office side tab if used.
- Staff View Input Buttons – N/A

School > Attendance > Class Office

Student Daily Attendance values and Class or Period Attendance values are separate. This screen lists all of the students in the school and has one column for the Daily code and columns for any scheduled periods in your school on the date selected on the top right of the screen. Records created for either the Daily or Class attendance values for a student will display in the appropriate columns.

Class attendance entered here will be visible in the Staff view, teachers can edit the record if necessary prior to posting the Staff view attendance.

**Note:** Rotating your schedule in the Build View as a part of the Schedule Build process will allow this screen to list the course sections in the order they occur on the date selected. Using the Bell Schedule to rotate the school schedule presents this screen in a flat schedule order and the user will need to determine which order the periods occur on the date selected. System Filters on the Class Office side tab include:

- **All Records:** This contains every student in the school, regardless whether they have an existing attendance record or not. Filters to narrow the scope of the list:
- **Attendance Activity:** Students with any attendance records assigned to them on the given date, regardless whether they are Daily Attendance or Class Attendance records
- **Truant List:** Students that have Absence records assigned in one or more classes during the day, but the student Daily Attendance value is empty
- **Course Section = ?:** Students scheduled into the selected course section
- **Attendance Discrepancy:** Students with a Daily Attendance value of Absent, but have no Absent records for any of their classes that day
- **Grade Level =?:** Students in a selected grade
- **Group =?:** Students in a specified group
- **Homeroom =?** Students in a selected homeroom
- **Program =?** Students in a specified program

### 7.1.2 Taking Class Attendance in the Class Office Side Tab

If a Daily Attendance record exists the values can be “pushed out” to all the classes. In the Daily Code column, there will be a Daily Attendance value, followed by two “greater than” symbols, like so: >>. Click that symbol and it will copy the A-E code to each of the student’s classes. This value will push out to all course sections scheduled that day. If the absence is for a portion of the day only, adjust the class attendance by period as needed.

When the teacher logs in, it will show that student has been marked absent for that section.

The screenshot shows the 'Class Attendance Office Input' interface. At the top, there is a navigation bar with tabs: Pages, School, Student, Staff, Attendance, Conduct, Grades, Assessment, Schedule, Global, Tools, Admin. Below the navigation bar, there is a search bar and a table of student attendance records. The table has columns for Name, Usual Name, Pupil #, Grade, Calendar, Daily Code, and six period columns (1-6). The student 'Alayoamaya, Tracii' is highlighted, and the 'Daily Code' column for this student shows '>>' in a red box, indicating that the attendance code is being pushed out to all classes.

| Name                   | Usual Name             | Pupil # | Grade | Calendar | Daily Code          | 1   | 2   | 3   | 4   | 5   | 6   |
|------------------------|------------------------|---------|-------|----------|---------------------|-----|-----|-----|-----|-----|-----|
| Aguirrecardenas, Rulmn | Aguirrecardenas, Rulmn | 238947  | 11    | Standard | A-E [Vacation] >>   | --- | --- | A-E | A-E | --- | --- |
| Alayoamaya, Tracii     | Alayoamaya, Tracii     | 409686  | 10    | Standard | ---                 | L   | --- | --- | --- | --- | --- |
| Album, Muskann         | Album, Muskann         | 295774  | 12    | Standard | A-E [Field Trip] >> | A-E | A-E | A-E | A-E | --- | --- |
| Aht, Hongo             | Aht, Hongo             | 244277  | 11    | Standard | A-E [Field Trip] >> | A-E | A-E | A-E | A-E | --- | A-E |

Class Attendance can also be entered for an individual by clicking on the ellipsis in the appropriate period column, bringing up a popup. An attendance code and reason can be entered for that class only.

The screenshot shows the 'Class Attendance Office Input' interface with a popup form open. The popup form is for the student 'Alayoamaya, Tracii' in the 'MEN-10-04' course, period '2' on the date '25/04/2017'. The form has checkboxes for 'Is absent?' (checked), 'Is late?' (unchecked), 'Is dismissed?' (checked), and 'Is excused?' (checked). There are dropdown menus for 'Other code' and 'Other code 2'. The 'Reason' field is set to 'Medical Appointment'. A comment box on the right contains the text 'Tracii leaving after period 1 for dental appointment.' The form has 'Save' and 'Cancel' buttons at the bottom.

Any changes you make in this screen will be visible to the teacher when they go to their Staff view > Attendance for this course section.

### 7.1.3 Entering Class Attendance for Multiple Students at the Same Time

School > Attendance > Class Office > Options > BC Multi-Add Class Attendance

- **Students to Include** – select the students
  - ♣ **Student IDs** – opens the Student IDs entry box for entry of pupil numbers
  - ♣ **Current Selection** – uses the Current Selection of students on the Class Office Screen. Filter to the group of students needed
- **Start and End Dates** – defaults to the current date, enter the correct date or range of dates for the attendance record entry
- **Select period(s)** – select a single or multiple periods from the picklist
- **Attendance code** – The code determines the type of Daily Attendance record created, select the appropriate code for
  - ♣ A – Absent
  - ♣ AE – Absent Excused
  - ♣ L - Late
  - ♣ LE – Late Excused
  - ♣ AUTH – Authorized
  - ♣ D – Early Dismissal
- **Time In** - available for entry when Attendance code of L - Late or LE - Late Excused is selected. Time can be entered as a numeric and will be automatically formatted on the student record - HH:MM AM/PM. (10:15 AM)
- **Time Out** – available for entry when Attendance code of D – Early Dismissal is selected. Time can be entered as a numeric and will be automatically formatted on the student record - HH:MM AM/PM. (10:15 AM)
- **Attendance Reason** – select the appropriate Attendance Reason from the picklist per school or district policy
- **Duplicated Records** - provides options for how the system handles a record if one already exists for a student on that date.
  - ♣ **Skip** – will not overwrite the existing class attendance record
  - ♣ **Replace** – will overwrite the existing class attendance record with the new information

Click **Run** to record these absences. A confirmation pop-up will appear indicating how many records were updated.

#### 7.1.4 Modifying Class Attendance in the Class Office Side Tab

Select the date on the top right of the screen and click the blue, hyperlinked Daily Attendance record or Class Attendance record to be modified. Change, add or remove any information as required for accuracy, or delete the entire record using *Options* > Delete. The Arrivals and Departures section can be edited by clicking into the blue hyperlinked details of the entry or using the *Add* or *Delete* buttons.

**Class Attendance Office Input**

Daily Office: Options Reports Help Search on Name

Daily Roster: (1) Adira, Ziya 0 of 688 selected Date: 06/03/2017

| Name                   | Usual Name             | Papil # | Grade | Calendar | Daily Code | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 |
|------------------------|------------------------|---------|-------|----------|------------|---|---|---|---|---|---|---|---|---|----|----|----|----|
| Adira, Ziya            | Adira, Ziya            | 530247  | 09    | Standard | A          | A | A | L | A |   |   |   |   |   |    |    |    |    |
| Aguirrecardenas, Ruben | Aguirrecardenas, Ruben | 236947  | 11    | Standard |            |   |   |   | L |   |   |   |   |   |    |    |    |    |
| Alacyang, Sungye       | Alacyang, Sungye       | 407279  | 10    | Standard |            |   |   |   |   |   |   |   |   |   |    |    |    |    |
| Alagband, Seukhyung    | Alagband, Seukhyung    | 628282  | 08    | Standard |            |   |   |   |   |   |   |   |   |   |    |    |    |    |
| Alayomaya, Traci       | Alayomaya, Traci       | 406686  | 10    | Standard |            |   | L |   |   |   |   |   |   |   |    |    |    |    |

#### 7.1.5 Secondary School Management

Secondary School Management handles how your school works with Cross-Enrolled students. These settings will allow students to show in your All Active Students and All Students filters. They also control which school has the ability to create or own a Daily Attendance record.

School > Setup > Preferences > Secondary School Management

- **Secondary Students**

♣ **Checked** - will include students with secondary associations to your school in the Active Students and related filters along with the students primary to your school. This is the recommended setting in BC for full functionality.

♣ **Unchecked** – will not include students with secondary associations to your school in the Active Students and related filters. Secondary students will show in All Students.

♣ **Secondary School Management** - pull-down menu determines which school can take and manage Daily Attendance.

♣ **None** – Only the Primary School can create and manage the Daily Attendance record.

♣ **Sole** – Only the Secondary school can create and manage the Daily Attendance record.

♣ **Shared** – Either the Primary or any of the student’s Secondary schools can create the Daily record; however once a record is created on a day only the school that created it can modify it at any point.

**Note:** This pull-down menu **ONLY** affects Daily Attendance. Class attendance for any course section can be edited by any one of the students Primary or Secondary schools.

#### 7.1.6 Positive Attendance in individual sections

Positive Attendance is Class Attendance where a student is defaulted to Absent and is marked Present if in attendance.

School view > School top tab > Setup > Preferences > Class Attendance > Advanced

- **Positive attendance in all classes** – unchecked

Set the number and type of attendance input buttons available in the staff view

The screenshot shows the 'Class Attendance' setup screen in the 'Advanced' tab. The 'Positive Attendance Input Buttons' section is highlighted with a red box. It shows a table with 5 buttons, each with a 'Code' dropdown and a 'Pop-up' checkbox. The 'Number of buttons' is set to 2. The 'Category' dropdown is set to 'Class Attendance'.

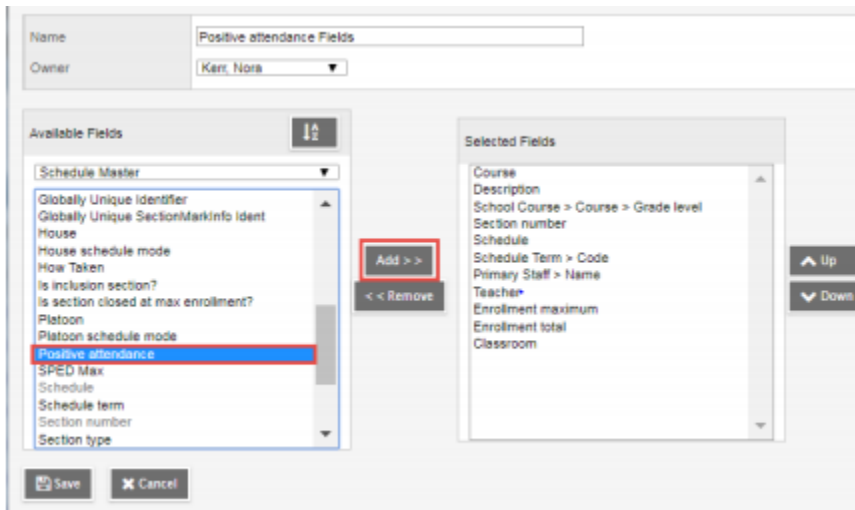
| Button   | Code | Pop-up                              |
|----------|------|-------------------------------------|
| Button 1 | POS  | <input type="checkbox"/>            |
| Button 2 | A    | <input checked="" type="checkbox"/> |
| Button 3 |      | <input type="checkbox"/>            |
| Button 4 |      | <input type="checkbox"/>            |
| Button 5 |      | <input type="checkbox"/>            |

School > Schedule > Master > Sections Add Positive Attendance to your field set:





In the Schedule Master table, highlight Positive Attendance and click the Add button



Select the Field Set and Options > Modify List Check the sections using Positive Attendance and check the green save checkbox at the top of the column.

| Course     | Description              | GrdLvl | PosAttendance                       | SecNo | Schedule | ScheduleTerm > Code | Primary Staff > Name          | Teacher                       | Max |
|------------|--------------------------|--------|-------------------------------------|-------|----------|---------------------|-------------------------------|-------------------------------|-----|
| FFRAL08-01 | FRENCH IMMERSION, 8      | 08     | <input checked="" type="checkbox"/> | 01    | 4(A)     | FY                  | Jonesfortugno, Charizemadison | Jonesfortugno, Charizemadison | 26  |
| FFRAL08-02 | FRENCH IMMERSION, 8      | 08     | <input type="checkbox"/>            | 02    | FY       |                     | Ainscow, Haykon               | Ainscow, Haykon               | 0   |
| MADER29-01 | INTRODUCTION TO ROBOTICS | 09     | <input type="checkbox"/>            | 01    | 4(A-B)   | S1                  | Starbyflesen, Ngockhuongday   | Starbyflesen, Ngockhuongday   | 26  |
| MADER29-03 | INTRODUCTION TO ROBOTICS | 09     | <input type="checkbox"/>            | 03    | 4(A)     | S1                  | Starbyflesen, Ngockhuongday   | Starbyflesen, Ngockhuongday   | 0   |

### 7.1.7 Attendance Codes

Student Attendance codes indicate what type of Attendance Record is created for the student. These six system codes, combined with optional additional settings define the type of attendance record. A Reason code may be assigned to indicate why a student was given the attendance record per school or district policy.

- **A (Absent)** – Absent Excused or Absent Unexcused

♣ Excused – check the excused checkbox or use the A-E dropdown if available o Unexcused – leave the checkbox unchecked

• **L (Late)** – Late Excused or Late Unexcused

♣ Excused – check the Excused checkbox

♣ Unexcused – leave the Excused checkbox unchecked

♣ Time In – place to record the time the student arrived (per school or district policy) defaults to the current time, edit as appropriate

• **D (Dismissal)** – Dismissal Excused and Dismissal Unexcused

♣ Excused – check the Excused checkbox

♣ Unexcused – leave the Excused checkbox unchecked

♣ Time Out – place to record the time the student left (per school or district policy) defaults to the current time, edit as appropriate

• **AUTH (Authorized)** –

♣ Absent? – determines if the AUTH code day is counted as an absence for the student in summary counts

♣ Checked will count as an absence for the student

♣ Unchecked will not count as an absence for the student

• **ISS (In School Suspension)** – can be applied as a standard attendance entry and is automatically assigned as ISS – Excused to a student given an In School Suspension with a date range in the Conduct module. The record can be edited to uncheck the Excused checkbox per school or district policy. See the Conduct Management guide for details.

• **OSS (Out of School Suspension)** can be applied as a standard attendance entry and is automatically assigned as OSS – Excused to a student given an Out of School Suspension with a date range in the Conduct module. The record can be edited to uncheck the Excused checkbox per school or district policy.

### 7.1.8 Attendance Reports

#### 7.1.8.1 Attendance Reports Class Attendance Reports

School > Attendance > Class Office side tabs

• **BC Class Attendance Call Sheet** – a BC report listing students with an Absent (unexcused) attendance record entered on that day, report includes: Name, Grade level, Homeroom, Gender, Attendance Code, and the Name and Phone numbers of the two student contacts with highest priority

♣ Date

- ♣ Sort results by – select Name, Grade Level or Homeroom from the dropdown list

- ♣ Format – select the format to print

- **BC Class Attendance Post Verification** – a BC report advising when and if Class attendance was posted by a staff user on the selected date. The report can be run for a selected course section or for a selected teacher.

- ♣ Start and End Dates - enter the range of dates to include on the report

- ♣ Select class – select a course section from the picklist

- ♣ Select teacher – select a teacher from the picklist

- ♣ Show non-posts only

- ♣ Check - to only show classes where attendance was not posted

- ♣ Uncheck - to show all classes and if they were posted or not

- ♣ Sort results by – Name or Time posted

- ♣ Format – select the format to print

- **BC Class Attendance Post History** – a BC report providing a historical record of attendance postings by course section or by teacher

- ♣ Start and End Dates - enter the range of dates to include on the report

- ♣ Select class – select a course section from the picklist

- ♣ Select teacher – select a teacher from the picklist

- ♣ Sort Results by – Date, Post Count or Period

- ♣ Format – select the format to print

- **BC Homeroom List w. Grid** – a BC report listing students in a course section with fillable column headers in a grid format

- ♣ Column Labels – enter the information to print in the Column Headers

- ♣ Sections to include – select All or select a Term Code, Course Number, Section, Schedule Expression or Teacher.

- ♣ Sort results by - select Course or Teacher

- ♣ Format – select the format to print

- **BC Principal's Attendance Report by Class** – a BC reporting tool allowing schools to review and analyze student Class attendance using a parameter form with multiple criteria. The tool will return a list of students that meet the specified threshold. If the criteria is to include Absences

greater than or equal to 3, the report will include students that have 3 or more absences per section, but will return a complete listing of the student's attendance in their other sections.

- ♣ Start and End Dates – enter the range of dates to include on the report
- ♣ Students to include – select All, Current Selection or select a YOG, Snapshot, Course Section, Combined Classes ID, Grade or Student Program
- ♣ Criteria – enter and combine different criteria to build the report
- ♣ Absence Code – use pre filled values or select a code from the dropdown
- ♣ Reasons – select from the dropdown
- ♣ Operator – select from the dropdown
- ♣ Exclude Excused – check to exclude for each criteria line
- ♣ Connector – select **And** or **Or** to combine criteria lines o Sort results by – Name, YOG or Homeroom o Group results by – Homeroom, House Code, Team Code
- ♣ Format – select the format to print

#### *7.1.8.2 Attendance Reports Class Attendance Reports*

School > Attendance > Daily side tabs > Reports

• **Absence Letter** – a core report which identifies students with five or more absences and prepares letters to send to parents. The report is not customizable by number of absences. Parameters that can be selected include:

- ♣ Start and End Dates – enter the range of dates to include on the report
- ♣ Exclude Excused Absences – check to exclude
- ♣ Include students with previous letters home – check to include
- ♣ Alternate mailings – check to send a letter to parent/guardian designated to receive attendance mailing in School > Student > Contacts
- ♣ Sort results by – select Name, YOG or Homeroom from the dropdown list
- ♣ Format – select the format to print

• **Attendance Bulletin** – a core report listing all students with an attendance record entered that day, report includes: Name, YOG, Homeroom, Absence Code and Time (if entered)

- ♣ Date
- ♣ Sort results by – select Name, YOG or Homeroom from the dropdown list
- ♣ Include secondary students – check to include o Format – select the format to print

• **BC Daily Attendance Call Sheet** – a core report listing students with an attendance record entered on that day, report includes: Name, YOG, Homeroom, Gender, Attendance Code, and the Name and Phone numbers of the two student contacts with highest priority

♣ Date

♣ Sort results by – select Name, YOG or Homeroom from the dropdown list

♣ Format – select the format to print

• **Attendance Classroom Input** – a core report listing the students in a course section with dates for the week selected as column headers

♣ Week of – select a date to define the date column headers

♣ Students to include – select: All or select a Class, Teacher or Course number

♣ Format – select the format to print

• **Attendance Homeroom Input** – a core report listing the students in a homeroom with dates for the week selected as column headers

♣ Week of – select a date to define the date column headers

♣ Students to include – select: All or select a Teacher or Homeroom

♣ Format – select the format to print

• **BC Homeroom List w. Desig** – a BC report listing students in a homeroom, based on the parameters selected the report can include: Name, Pupil #, Gender, Grade, Age, Birthday, Student Services Designation and Aboriginal Ancestry indicator

♣ Students to include – All or select a Homeroom or Grade

♣ Aboriginal Y/N – check to include the Aboriginal Ancestry column in the report

♣ Include Exceptionality Type – Defaults to all designations checked

♣ Checked – an assigned 1701 primary designation program will print

♣ Unchecked – will not print designations in the column

♣ Sort Results by – select Name or Grade

♣ Format – select the format to print

• **BC Homeroom List w. Grid** – a BC report listing students in a homeroom with fillable column headers in a grid format

♣ Column Labels – enter the information to print in the Column Headers

♣ Students to include – select All or select a Homeroom or Grade

♣ Sort results by - select Name or Grade

- ♣ Format – select the format to print

- **Consecutive Absence List** – a core report listing students absent for a selected number of days in a row during the specified date range

- ♣ Start and End Dates – enter the range of dates to include on the report

- ♣ Count – enter the minimum consecutive absence records needed to include the student on the report

- ♣ Exclude excused – check to exclude

- ♣ Sort results by – select Name, YOG, Homeroom or Count

- ♣ Include secondary students – check to include

- ♣ Format – select the format to print

- **Daily Attendance Post Verification** – a core report advising when and if Daily attendance was posted by a staff user on the selected date

- ♣ Date

- ♣ Show non-posts only

- ♣ Check - to only show classes where attendance was not posted

- ♣ Uncheck - to show all classes and if they were posted or not

- ♣ Sort results by – Name or Time posted

- ♣ Format – select the format to print

- **Principal's Attendance** – a core report tool allowing schools to review and analyze student Daily attendance using a parameter form with multiple criteria

- ♣ Start and End Dates – enter the range of dates to include on the report

- ♣ Students to include – select All or select a YOG or Snapshot

- ♣ Criteria – enter and combine different criteria to build the report

- ♣ Absence Code – use pre filled values or select a code from the dropdown

- ♣ Reasons – select from the dropdown

- ♣ Operator – select from the dropdown

- ♣ Exclude Excused – check to exclude for each criteria line

- ♣ Connector – select And or Or to combine criteria lines

- ♣ Sort results by – Name, YOG or Homeroom

- ♣ Group results by – Homeroom, House Code, Team Code
- ♣ Format – select the format to print

## 8.0 School Set-Up

### 8.1 Define School Details

School View > School Top Tab > Setup Side Tab > Details Leaf

#### 8.1.1 General

- **Identifier** = Ministry school number (there should be no leading zero)
- **Name** = School Name
- **Type** = Standard, Continuing Ed, DL, Alternate; choose the appropriate one
- **School Level** = Early Learning Ctr, Elementary, Middle, Secondary, Alt, Cont Ed, Dist Ed
- **Start grade** = **-1** (Early Learning), **0** – **KF Elementary**, **6 Middle**, **9 Secondary**
- **Number of Grades** = **1** (EL - *StrongSt*), **6** (K – 5) *Elementary*, **3** (6-8) *Middle*, **4** (9-12) *Secondary*
- **Build Year** = Click X & Save, Click the magnifying glass and appropriate year. Select 2020 for the 2019-2020 year from the list & Click SAVE
- **Default Transcript** = Choose the appropriate default Transcript type
- **School Sub Type** = Regular Day School
- **Phone, Fax, Principal, VP** = School's information
- **Is inactive?** & **Is archive?** = Both are Unchecked
- **Class to Daily Attendance** = Unchecked (Elementary, StrongStart, RMS & SMS) Checked (Middle & Secondary) SAVE

#### 8.1.2 Address

Enter the school's address information and click 

### 8.2 School Calendar

Districts must initialize a calendar to determine the session dates and non-session dates within their district.

A school calendar name of **Standard** will allow all schools with secondary students to take attendance on students from other schools with a calendar name of **Standard**.

School top tab > Calendars side tab > Dates leaf

The screenshot shows the 'School Calendar' interface for the 2016-2017 school year. The top navigation bar includes tabs for Pages, School, Student, Staff, Attendance, Conduct, Grades, Assessment, Schedule, Global, Tools, and Admin. The main header displays 'School Calendar :: 2016-2017 - Standard'. Below this, there are buttons for Options, Reports, and Help, along with a search bar and various icons. A date selector is set to 3/18/2016, and it indicates that 0 of 365 records are selected. The main content is a table with the following data:

| Date       | InSession? | DayNum | DayType | Bel > Name |
|------------|------------|--------|---------|------------|
| 18/10/2016 | Y          | 2      |         | Tuesday    |
| 19/10/2016 | Y          | 1      |         | Wednesday  |
| 20/10/2016 | Y          | 2      |         | Thursday   |
| 21/10/2016 | N          | 0      | Pro D   |            |

• If the school does not see dates in the School top tab > Calendars side tab > Dates leaf, the school should:

- ♣ Contact the district support desk and ask if the district calendar has been initialized. If not, the school should wait for the district calendar to be initialized as that process could overwrite the manually created school calendar.

Review the school Active Schedule Calendar, re-assign schedule days and modify in-session dates as necessary to reflect school-specific session or non-session dates.

### 8.2.1 Modifying Individual Dates

School view > School top tab > Calendars > Select the current school year > Dates

School dates should be populated, if Dates are not populated **contact the district L1** to initialize the calendar.

Review the dates, days when attendance is taken in the school show InSession = Y. Any noninstructional/non-attendance days that are needed the school level can be entered now or later in the year.

To change or add a non-attendance day:

- Click into the blue hyperlink date
- Uncheck the 'Is school in session' checkbox
- Select the 'Schedule day type' from the dropdown list
- Save



This date is now not an attendance date in the school. In School > Attendance on the nonattendance dates the screens will show not in session and a pop-up showing it is not a valid calendar day.

| Date       | InSession? | DayNum | DayType         | Bell > Name |
|------------|------------|--------|-----------------|-------------|
| 17/09/2016 | N          | 0      |                 |             |
| 18/09/2016 | N          | 0      |                 |             |
| 19/09/2016 | Y          | 1      |                 | Monday      |
| 20/09/2016 | Y          | 2      |                 | Tuesday     |
| 21/09/2016 | Y          | 1      |                 | Wednesday   |
| 22/09/2016 | Y          | 2      |                 | Thursday    |
| 23/09/2016 | N          | 1      | Curriculum Impl | Friday      |

School view > School top tab > Calendars > Select the current school year > Dates > Filter set to Days in Session

| Date       | InSession? | DayNum | DayType | Bell > Name |
|------------|------------|--------|---------|-------------|
| 16/09/2016 | Y          | 2      |         | Friday      |
| 19/09/2016 | Y          | 1      |         | Monday      |
| 20/09/2016 | Y          | 2      |         | Tuesday     |
| 21/09/2016 | Y          | 1      |         | Wednesday   |
| 22/09/2016 | Y          | 2      |         | Thursday    |
| 26/09/2016 | Y          | 2      |         | Monday      |
| 27/09/2016 | Y          | 1      |         | Tuesday     |
| 28/09/2016 | Y          | 2      |         | Wednesday   |
| 29/09/2016 | Y          | 1      |         | Thursday    |
| 30/09/2016 | Y          | 2      |         | Friday      |

Only dates with the Is School in Session checkbox checked appear in the Days in Session filter. Enter the **Day Number** and **Bell Schedule Name** if used in the school.

Adjust records as required using **Options > Mass update or Modify List** or click into the blue hyperlinked date and edit the individual record as required.

- **InSession?:** will = Y for all records in this filter
- **DayNum:** type the Schedule Day Number
  - ♣ From: School > Schedule > Structure > Days
- **Schedule day type:** will = blank for all records in this filter, day type is used with days not in session
- **Bell > Name:** select the Bell Schedule for the day from the picklist o From: School > Schedule > Structure > Bell Schedule
- **Save**

### 8.2.2 To Reassign Schedule Days (Middle)

If your school uses a schedule with schedule days, and a day is defined as not-in-session on the school's calendar, the schedule days can be re-numbered to match the days school is in session.

School Calendar :: 2016-2017 - Standard

| Date       | InSession? | DayNum | Day Type        | Bell > Name |
|------------|------------|--------|-----------------|-------------|
| 12/06/2017 | N          | 2      | Curriculum Impl |             |
| 13/06/2017 | Y          | 1      |                 | T, W, F     |
| 14/06/2017 | Y          | 2      |                 | T, W, F     |
| 15/06/2017 | Y          | 1      |                 | Thursday    |
| 16/06/2017 | Y          | 2      |                 | T, W, F     |

School view > School top tab > Calendars side tab > Dates > Options > Reassign Schedule Days In the popup enter the following:

- **Start Date:** the date changed to a Not in Session date
- **End Date:** the day the reassignment of day numbers should end
- **Initial Schedule Day:** the day number to begin with on the Start Date

**Reassign Schedule Days**

Calendar ID: Standard

Start Date: 12/06/2017

End Date: 30/06/2017

Initial Schedule Day: 2

OK Cancel

| Date       | InSession? | DayNum | Day Type        | Bel > Name |
|------------|------------|--------|-----------------|------------|
| 12/06/2017 | N          | 0      | Curriculum Impl |            |
| 13/06/2017 | Y          | 2      |                 | T, W, F    |
| 14/06/2017 | Y          | 1      |                 | T, W, F    |
| 15/06/2017 | Y          | 2      |                 | Thursday   |
| 16/06/2017 | Y          | 1      |                 | T, W, F    |

**Note:** If you want your schedule days to match the days school is in session, you need to reassign schedule days for every day you define as not in session on your calendar (except weekends, if your school is not in session on weekends).

### 8.2.3 Creating a School Calendar

When the district initializes a calendar, a standard calendar will be created for each school checked with the district calendar was initialized. A school should not normally have to initialize a school calendar unless they are creating more than one calendar in their school.

1. Log on to the School view.
2. On the menu bar, click Options and select Add.
3. In the Calendar ID field, enter a unique description for this new calendar.
4. Select the Static Schedule Days checkbox if the school does not adjust schedule days for not-in-session dates. For example, if the schedule operates with Days 1-7, and the day before a holiday is Day 4, the schedule day when school resumes is Day 6.
5. The Required Number of in Session Days will populate automatically from the district calendar. The field can be modified, if necessary.
6. Number of days in session cannot be populated – this will be determined when the calendar is initialized and the school can refine the calendar as necessary.
7. Use the icon to select the School Year Context > Year ID. This should match the year you for which you are creating the calendar.
8. Click Save.

### 8.2.4 Initializing the School Calendar

1. Log on to the School view.
2. Go to the School top tab.
3. Click the Calendars side tab.
4. Check the box beside the calendar you want to initialize.
5. Click the Details leaf under the Calendars side tab.
6. In the Options menu, select Initialize Calendar.

7. In the Initialize School Calendar pop-up window, select, or de-select Saturday and Sunday if school is in session on these days.
8. Set the Initial Schedule Day, if applicable. (There will only be a value in this drop-down menu if at least one day is defined in the Schedule top tab, Structure side tab, Terms sub-side tab).
9. Click OK.

### 8.3 Set-up Schedule Terms

School View > Schedule Top Tab > Structure Side Tab

- **Options** > Add
- **Code** = use drop down to choose

|                             |   |            |
|-----------------------------|---|------------|
| <b>Code</b>                 | S1  |            |
| <b>Name</b>                 | Sem1  |            |
| <b>Base terms per year</b>  | 2   | Set        |
| <b>Term map</b>             | <input checked="" type="checkbox"/> <input type="checkbox"/>  |            |
| <b>Term Date Ranges</b>     | <b>Start</b>  | <b>End</b> |
| 1                           | 9/8/2015  | 1/28/2016  |
| <b>Grade term cover map</b> | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |            |

- **Name** = FY, S1, S2, T1, Q1.....
- **Base terms per year** = # times per year courses could start (1,2,3,4...) then click Set
- **Term Map** = put check in proper box of when this course starts
- Add schedule term start and end dates
- **Grade term cover map** =put checks in boxes that represent which of the terms classes using this schedule term will be reported on
- Click **Save**

#### 8.3.1 Schedule Terms

Schedule terms define course section durations. A schedule term must be created for each portion of the school year in which a single course section can be scheduled.

For example, some school schedules may offer course sections in three trimesters (12-week courses) and a full-year term (full year courses). Another school schedule may offer courses in two semesters (semester length courses) and a full-year term. Review the Schedule Term Codes reference table to ensure all the values required for the school are shown in the table.

##### 8.3.1.1 To define the Schedule Term Codes reference table:

School > Admin > Reference

- Search for the Schedule Term Codes reference table in the search bar
- Select the table
- Click the Codes leaf
- Set the Filter to All Records

Review the records to ensure all Schedule Terms the school uses are listed.

To add additional terms:

Options > Add

- **Code:** Enter the value that appears in drop down menus for selection
- **Description:** Enter a description of the Term
- Click **Save**.

**Reference Tables :: Schedule Term Codes**

Reference  
 Details  
 Codes  
 Fields

Comments  
 Licenses  
 Logs

| <input type="checkbox"/> | Code    | Description     |
|--------------------------|---------|-----------------|
| <input type="checkbox"/> | 9W - T1 | 9-week - Term 1 |
| <input type="checkbox"/> | 9W - T2 | 9-week - Term 2 |
| <input type="checkbox"/> | 9W - T3 | 9-week - Term 3 |
| <input type="checkbox"/> | 9W - T4 | 9-week - Term 4 |
| <input type="checkbox"/> | FY      | Full year       |
| <input type="checkbox"/> | S1      | First semester  |
| <input type="checkbox"/> | S2      | Second semester |

*8.3.1.2 To define schedule terms:*

School > Schedule > Structure In the screenshot below, the school offers full-year courses (defined by the code FY) and Semester courses (defined by the codes S1 and S2).

Pages School Student Staff Attendance Conduct Grades Assessment Schedule Global Tools Admin

Options Reports Help

**Schedule Terms**

Master 0 of 3 selected

| <input type="checkbox"/> | Code               | Name | TPY | CoveredTPY | BaseTPY | BaseMap | UniversalMap | GradeTermMap |
|--------------------------|--------------------|------|-----|------------|---------|---------|--------------|--------------|
| <input type="checkbox"/> | <a href="#">FY</a> | FY   | 2   | 1          | 1       | 1       | 11           |              |
| <input type="checkbox"/> | <a href="#">S1</a> | S1   | 2   | 1          | 2       | 10      | 10           |              |
| <input type="checkbox"/> | <a href="#">S2</a> | S2   | 2   | 1          | 2       | 01      | 01           |              |

Terms  
 Details

Click the blue Code link to view the details of the schedule term. The screen shot below shows the first of the school's semester courses.


- Course sections of this duration can happen as many as 4 times per year (**Base terms per year**). Clicking the Set button generates the Term map.
- This schedule term is defined as the first of the 2 semesters, so the first box of the **Term map** is selected.
- **Term date ranges** define when this schedule term starts and ends.
- **Grade term cover map** defines which of the 4 grade terms the school is going to report on this course section. These boxes may not appear if grade terms have not been defined and can be populated after grade terms are created.

**Schedule Terms :: S1**

Save Cancel

|                |                                |   |
|----------------|--------------------------------|---|
| Master         | <b>Code</b>                    | S1  |
| Schedules      | <b>Name</b>                    | S1  |
| Courses        | <b>Base terms per year</b>     | 2 <input type="button" value="Set"/>  |
| Rooms          | <b>Term map</b>                | <input checked="" type="checkbox"/> <input type="checkbox"/>  |
| <b>Terms</b>   | <u><b>Term Date Ranges</b></u> | <u>Start</u> <input type="text" value="9/2/2014"/> <input type="button" value="Calendar"/> <u>End</u> <input type="text" value="2/6/2015"/> <input type="button" value="Calendar"/> |
| ► Details      | 1                              |   |
| Days           | <b>Grade term cover map</b>    | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>   |
| Periods        |                                |   |
| Bell Schedules |                                |   |

Use the following table to enter information in the fields for all required schedule terms:

| Field                       | Description  |
|-----------------------------|--|
| <b>Code</b>                 | Select the code for the schedule term. For example, you might select FY for a full-year term, and S1 for Semester 1.   |
| <b>Name</b>                 | Type a name for the schedule term (Quarter, Tri1, 12-week, etc.)   |
| <b>Base terms per year</b>  | Type the total number of this type of schedule term in your schedule. For example, for a course that meets one-third of the year (a single trimester), there are three base terms. For a course that meets half of the year (a single semester), there are two base terms.   |
| <b>Term map</b>             | Select the checkbox that represents which of the base terms this specific schedule term covers. For example, if you are defining Semester 1 and there are two base terms, select the first checkbox to indicate that this term is the first of the two terms.<br><br><div style="border: 1px solid black; padding: 5px; background-color: #fff9c4;"> <p><b>Note:</b> The system displays checkboxes that equal the number of base terms you identify at the Base terms per year field. For example, if you identify 3 base terms, three checkboxes appear.</p> </div>  |
| <b>Term Date Ranges</b>     | Type the date or click the  icon to select the Start and End dates of this schedule term. The system validates these dates against the school year dates. For example, you cannot enter a start date that is before the first day of the school year.   |
| <b>Grade term cover map</b> | This identifies which grade terms classes using the schedule term will be reported on.<br>For example, if you are defining the Semester 1 schedule term and your school operates with quarter grade terms, you select the first two checkboxes. This indicates to the system that a value will be entered for the first two terms within this schedule term, but not the last two.<br><br>K-12 schools may have a combination of trimester and quarterly grade terms, in which case, two sets of grade term cover map boxes will appear and schools will need to associate the appropriate grade term to the schedule term, depending on how many times a year courses of that duration are reported on. |

## 8.4 Grade Terms

Grade Terms must be entered for all schools in your district. In the School view, each school will define the dates for each grade term. For example: If you operate with four grading quarters (Q1, Q2, Q3, Q4), you might define the grade term dates as follows:

| Quarter | Start Date  | End Date    |
|---------|-------------|-------------|
| Q1      | September 2 | November 23 |
| Q2      | November 24 | February 2  |
| Q3      | February 3  | April 12    |
| Q4      | April 13    | June 26     |

Trimester example: If you operate with three grading terms per year (Tri 1, Tri 2, Tri 3), you might define the grade term dates as follows:

| <b>Trimester</b> | <b>Start Date</b>  | <b>End Date</b>   |
|------------------|--------------------|-------------------|
| <b>Tri 1</b>     | <b>September 2</b> | <b>December 8</b> |
| <b>Tri 2</b>     | <b>December 9</b>  | <b>March 13</b>   |
| <b>Tri 3</b>     | <b>March 14</b>    | <b>June 26</b>    |

Additional grade terms can be defined to reflect the reporting requirements for other grades.

Example: A school operating with Grades K-12 may have both Quarters and Trimesters defined. This would allow them to report on Grade K-7 courses three times per year and Grade 8-12 courses four times per year.




| <b>Reporting Period</b> | <b>Start Date</b>  | <b>End Date</b>    |
|-------------------------|--------------------|--------------------|
| <b>Q1</b>               | <b>September 2</b> | <b>November 23</b> |
| <b>Q2</b>               | <b>November 24</b> | <b>February 2</b>  |
| <b>Q3</b>               | <b>February 3</b>  | <b>April 12</b>    |
| <b>Q4</b>               | <b>April 13</b>    | <b>June 26</b>     |
| <b>Tri 1</b>            | <b>September 2</b> | <b>December 8</b>  |
| <b>Tri 2</b>            | <b>December 9</b>  | <b>March 13</b>    |
| <b>Tri 3</b>            | <b>March 14</b>    | <b>June 26</b>     |

#### 8.4.1 Defining grade term dates for a school:

School > Grades > Grade Terms > Options > Add

The New Grade Term Date page appears.



|  |               |  |              |                   |                |               |
|--|---------------|--|--------------|-------------------|----------------|---------------|
| <b>Pages</b>   | <b>School</b> | <b>Student</b>   | <b>Staff</b> | <b>Attendance</b> | <b>Conduct</b> | <b>Grades</b> |
| Options  |               | Reports  |              | Help              |                |               |
| <b>Grade Term Dates :: New Grade Term Date</b>   |               |  |              |                   |                |               |
| <b>Grade Terms</b><br>▸ Details<br>Transcripts<br>Transcript Column Attributes<br>Credit Adjustments<br>Grade Input<br>Grade Post Controls |               | Save Cancel<br><hr/> <b>Grade Term Definition &gt;</b><br><b>Name</b><br>Term ID * <input type="text"/> <br>Start date * <input type="text"/> <br>End date * <input type="text"/> <br><hr/> Save Cancel |              |                   |                |               |

- **Term ID:** Select the correct grade term from the picklist
- **Start Date and End Date:** Use the calendar icon to select the Start and End dates of the Grade Term
- Click **Save**.



Repeat for each grade term required in the school.

#### 8.4.2 Setting the Grade term cover maps

School > Schedule > Structure > Terms > Details

In the Grade term cover map section, select the checkboxes that represent the terms that classes with this schedule term will be reported on and save.

After committing a Master Schedule, these checkboxes will be populated. It is recommended to reset and save the Grade term cover maps to ensure they are linked correctly as a part of startup.

|                             |   |   |
|-----------------------------|---|---|
| <b>Code</b>                 | FY ▾  |   |
| <b>Name</b>                 | FY  |   |
| <b>Base terms per year</b>  | 1   | Set   |
| <b>Term map</b>             | <input checked="" type="checkbox"/>   |   |
| <b>Term Date Ranges</b>     | <u>Start</u>  | <u>End</u>  |
| 1                           | 9/2/2014   | 6/25/2015  |
| <b>Grade term cover map</b> | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> |   |

The grade term cover map can appear differently for schools that have both quarterly grade terms and trimester grade terms. The scenario below describes an example where a school has trimester grade terms for grades K-7 and quarterly grade terms for grades 8-12.

Grades top tab > Grade Terms in this scenario may appear as:

| Grade Terms              |       |            |            |
|--------------------------|-------|------------|------------|
| Details                  |       |            |            |
| <input type="checkbox"/> | ID    | Start      | End        |
| <input type="checkbox"/> | Q1    | 9/4/2012   | 11/16/2012 |
| <input type="checkbox"/> | Q2    | 11/17/2012 | 2/1/2013   |
| <input type="checkbox"/> | Q3    | 2/2/2013   | 4/12/2013  |
| <input type="checkbox"/> | Q4    | 4/13/2013  | 6/28/2013  |
| <input type="checkbox"/> | Tri 1 | 9/4/2012   | 12/7/2012  |
| <input type="checkbox"/> | Tri 2 | 12/9/2012  | 3/15/2013  |
| <input type="checkbox"/> | Tri 3 | 3/16/2013  | 6/28/2013  |

In this setup, schedule terms will display two sets of grade term cover maps. The school will determine which schedule terms are associated to which grade term, depending on whether the course is reported three times a year or four times a year.

## 8.5 Days/Periods

Days and periods must be set in order to create the school bell schedules which follow. To add schedule days:

### 8.5.1 To define the number of days:

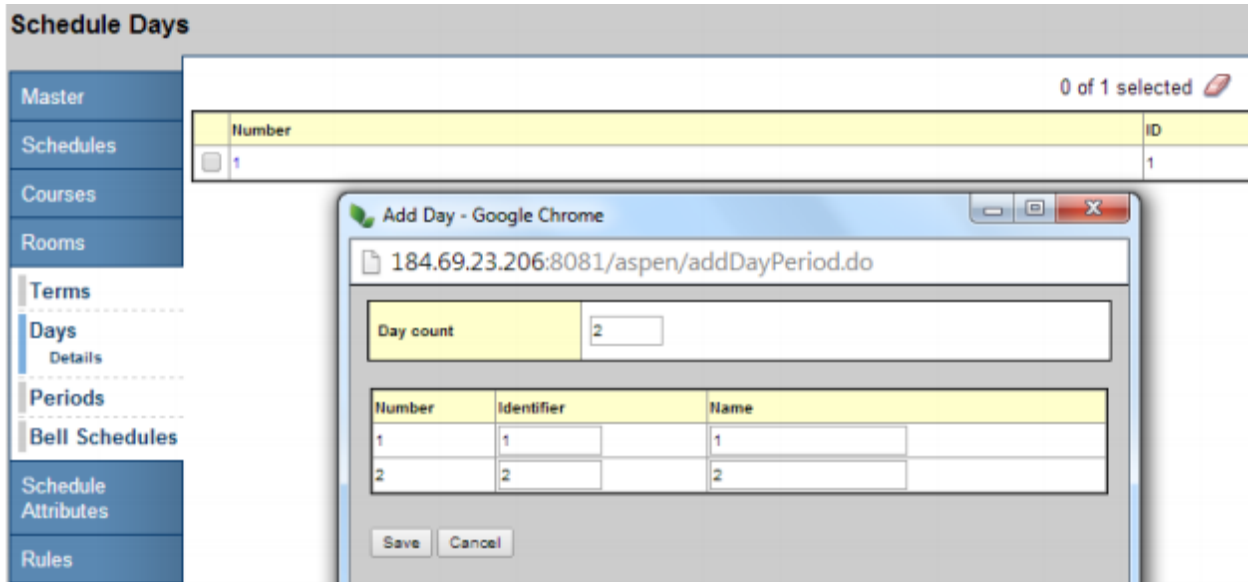
Schedule > Structure > Days

Review the information to ensure the days the school requires are listed.

To add additional days:

Options > Add

From the Add Day window, enter the number of days in the Day count field that are required in total and complete the lower section as shown below:

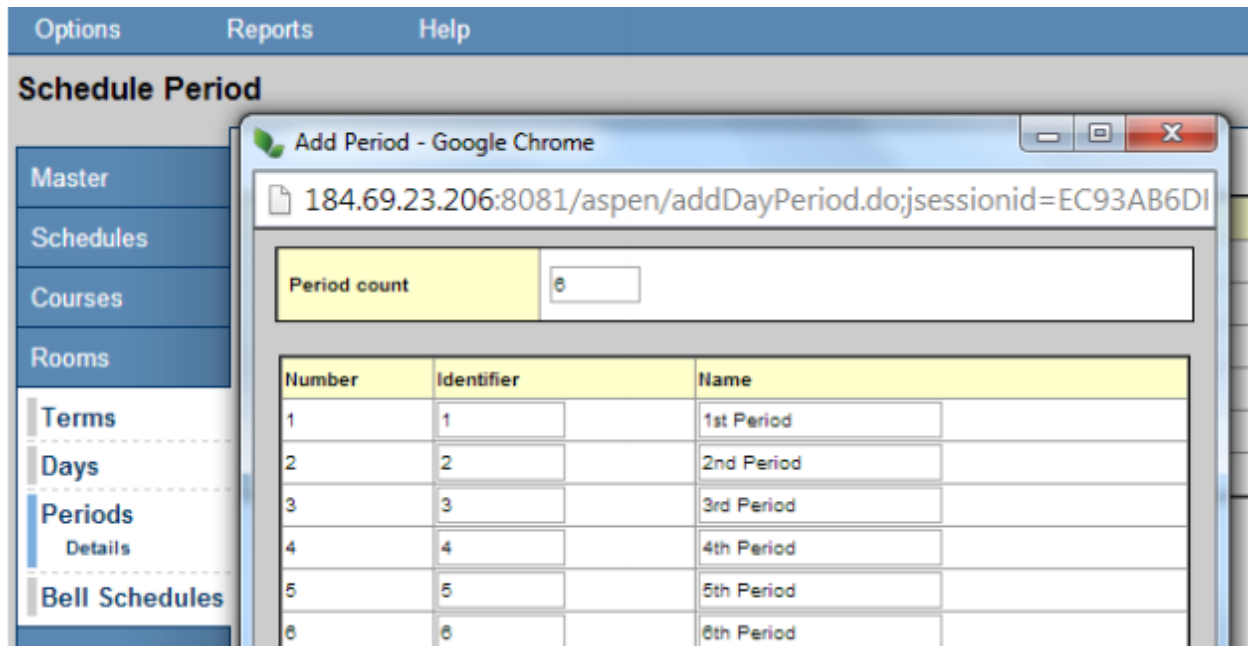


- If too many days are created in error, re-enter the Add Day window and type in the number of days required in the Day count box. This will adjust the number of days below to the appropriate number and remove any extras.

8.5.2 To define the number of periods:


Schedule > Structure > Periods

If necessary, use the **Options> Add** to create additional periods. In the **Add Period** window complete the number of periods to be used in the bell schedule. These will include periods for out of timetable courses for which attendance will be taken.



- If too many periods are created in error, re-enter the *Add Period* window and type in the number of periods required in the **Period** count box. This will adjust the number of periods below to the appropriate number and remove any extras.

## 8.6 Bell Schedules

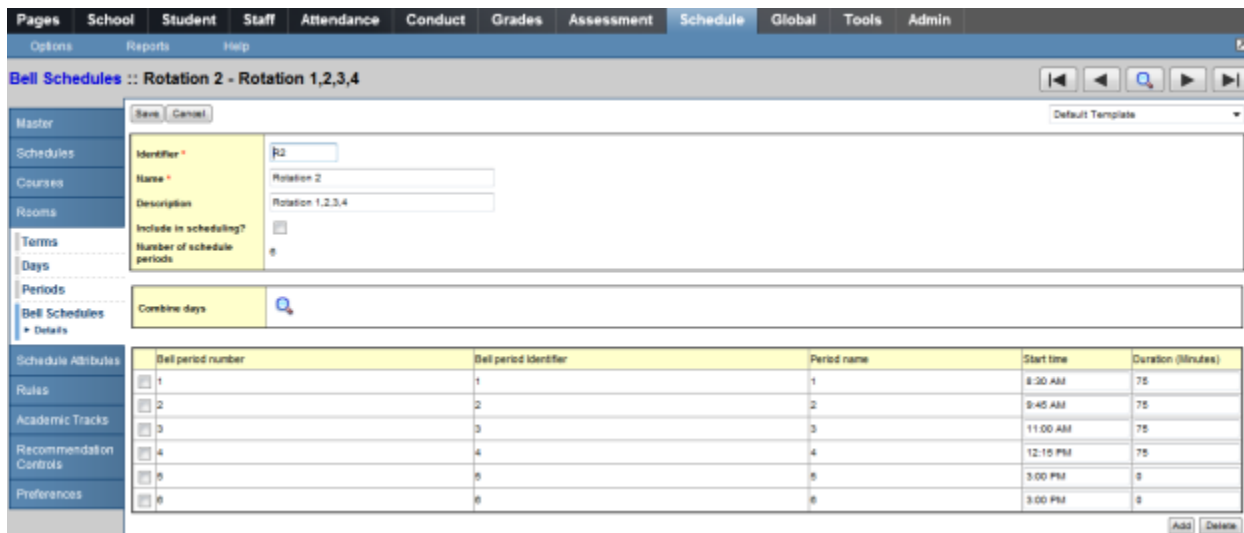
Each date in the school Calendar is assigned a Bell Schedule, indicating the periods offered on that date and their length. This enables schools to find students throughout their course rotation using the quick status icon .

**MyEducation BC** allows schools to use several bell schedules to operate differently on different dates of the year. For example, you may have flex day once a week where the period durations are shorter. This can be accommodated through creating a bell schedule for that rotation and assigning it to the appropriate calendar dates.

### 8.6.1 Defining bell schedules:

School > Schedule > Structure > Bell schedules > Options > Add

The New Schedule Bell page appears:



| Bell period number | Bell period identifier | Period name | Start time | Duration (minutes) |
|--------------------|------------------------|-------------|------------|--------------------|
| 1                  | 1                      | 1           | 8:30 AM    | 75                 |
| 2                  | 2                      | 2           | 9:45 AM    | 75                 |
| 3                  | 3                      | 3           | 11:00 AM   | 75                 |
| 4                  | 4                      | 4           | 12:15 PM   | 75                 |
| 5                  | 5                      | 5           | 3:00 PM    | 0                  |
| 6                  | 6                      | 6           | 3:00 PM    | 0                  |

- Type a unique Identifier, Name, and Description for the bell schedule.
- The 'Include in scheduling?' checkbox, is functionality that will be used by the build engine. During initial setup there are no implications of setting this box either way.
- For each period, define the Start time and Duration (Minutes).
- Continue to follow steps 4-8 to define all of the bell schedules the school uses.

**Note:** The start time for each period does not have to be sequential like the period number order. You can change the order of periods for a particular day without modifying the actual schedule.

- To add an additional period for an after-school program, or another extra period not in the academic schedule, click **Add**. The Add Bell Period dialog box appears. Define the **Bell period number, Period name, Start time, and Duration (Minutes)**, and click **OK**.

- Click **Save**.

## 8.6.2 Using Bell Schedules to Rotate Periods:

**Note:** If a Rotation was created in the Build view, this section is not applicable.

The following pages provide examples of different ways to Rotate Periods using Bell Schedules.

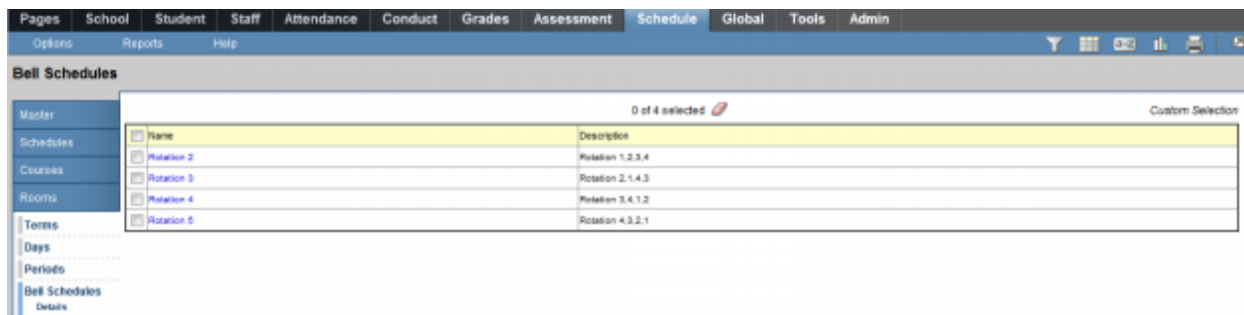
### Scenario 1

2-day schedule, 4 regular periods, plus 2 periods outside of the timetable.

This scenario has 4 course rotations – R2, R3, R4 and R5

School > Schedule > Structure > Bell schedule

In this example 4 Bell Schedules have been created, each representing a different rotation.



| Name       | Description      |
|------------|------------------|
| Rotation 2 | Rotation 1,2,3,4 |
| Rotation 3 | Rotation 2,1,4,3 |
| Rotation 4 | Rotation 3,4,1,2 |
| Rotation 5 | Rotation 4,3,2,1 |

- Click on the Name of a Bell Schedule to view the details.
- Enter Start times for each period to reflect the order in which course periods should appear for that rotation. For example, to accommodate the second rotation of 2,1,4,3 the following is the setup.
- Click **Save**.

This will re-order the periods to your defined rotation.

The screenshot shows the 'Bell Schedules' application interface. The top navigation bar includes 'Pages', 'School', 'Student', 'Staff', 'Attendance', 'Conduct', 'Grades', 'Assessment', 'Schedule', 'Global', 'Tools', and 'Admin'. The main title is 'Bell Schedules :: Rotation 3 - Rotation 2,1,4,3'. The left sidebar contains a navigation menu with options like 'Master', 'Schedules', 'Courses', 'Rooms', 'Terms', 'Days', 'Periods', 'Bell Schedules', 'Schedule Attributes', 'Rules', 'Academic Tracks', 'Recommendation Controls', and 'Preferences'. The main content area has a form for editing a schedule. The form fields include: Identifier (R3), Name (Rotation 3), Description (Rotation 2,1,4,3), Include in scheduling? (checkbox), and Number of schedule periods (6). Below the form is a table with the following data:

| Bell period number | Bell period Identifier | Period name | Start time | Duration (Minutes) |
|--------------------|------------------------|-------------|------------|--------------------|
| 1                  | 2                      |             | 8:30 AM    | 75                 |
| 2                  | 1                      |             | 9:45 AM    | 75                 |
| 3                  | 4                      |             | 11:00 AM   | 75                 |
| 4                  | 3                      |             | 12:15 PM   | 75                 |
| 5                  | 5                      |             | 3:00 PM    | 0                  |
| 6                  | 6                      |             | 3:00 PM    | 0                  |

**In the above example:**

Courses scheduled into period 2 will start at 8:30 am.

Courses scheduled into period 1 will start at 9:45 am.

Courses scheduled into period 4 will start at 11:00 am.

Courses scheduled into period 3 will start at 12:15 pm.

### Scenario 2

1-day schedule, 8 regular periods, plus 2 periods outside of the timetable.

This scenario has 4 course rotations – R2, R3, R4 and R5

*School > Schedule > Structure > Bell schedule*

In this example, 4 Bell Schedules have been created, each representing a different rotation.

The screenshot shows the 'Bell Schedules' application interface with a list of four rotations. The top navigation bar is the same as in the previous screenshot. The main content area shows a table with the following data:

| Name       | Description             |
|------------|-------------------------|
| Rotation 2 | 1 Day & Periods 1,2,3,4 |
| Rotation 3 | 1Day & Periods 5,6,7,8  |
| Rotation 4 | 1Day & Periods 2,1,4,3  |
| Rotation 5 | 1Day & Periods 6,5,8,7  |

- Click on the Name of a Bell Schedule to view the details.
- Enter Start times for each period to reflect the order in which course periods should appear for that rotation. For example, to accommodate the second rotation of 2,1,4,3 the following is the setup.
- Click Save.

This will re-order the periods to your defined rotation.

### Example 1

| Bell period number | Bell period identifier | Period name | Start time | Duration (Minutes) |
|--------------------|------------------------|-------------|------------|--------------------|
| 1                  | 1                      | 1           | 8:30 AM    | 75                 |
| 2                  | 2                      | 2           | 9:45 AM    | 75                 |
| 3                  | 3                      | 3           | 11:00 AM   | 75                 |
| 4                  | 4                      | 4           | 12:15 PM   | 75                 |
| 5                  | 5                      | 5           | 3:00 PM    | 0                  |
| 6                  | 10                     | 10          | 3:00 PM    | 0                  |

**In the above example:**

Courses scheduled into period 1 will start at 8:30 am.

Courses scheduled into period 2 will start at 9:45 am.

Courses scheduled into period 3 will start at 11:00 am.

Courses scheduled into period 4 will start at 12:15 pm.

### Example 2

Courses scheduled into period 6 will start at 8:30 am.

Courses scheduled into period 5 will start at 9:45 am.

Courses scheduled into period 8 will start at 11:00 am.

Courses scheduled into period 7 will start at 12:15 pm

### 8.6.3 Assigning Bell Schedules to Calendar Dates

*School > School > Calendars > Dates > Filter to Days in Session*

Use Options > Modify List (for different values) or Options > Mass Update (for a single value) to update the Days in Session with a Bell Schedule.

### 8.7 Assigning Calendars to Students

Every student in the school must have a Calendar assigned. Calendars can be assigned individually in:

*School > Student > Details > Calendar*

Or for a group of students:

*School > Student > Select the students > Options > Show selected*

- Confirm the correct students are listed
- Use a field set with the student Calendar field
- Options > Mass Update

## 8.8 Assigning Homerooms to Teachers and Students

Homerooms are assigned to teachers individually through:

School > Staff > Details

Homerooms are assigned to students individually through:


School > Student > Details

Homerooms can also be assigned all at once by using either the features of **Modify List** or **Mass Update**.

### 8.8.1 Assigning Homerooms to multiple teachers

School > Staff > Options > Modify List

Enter the homeroom and save using the green checkbox

| Staff List   |                 |            |          |                |           |           |                         |      |                        |       |                                     |
|--|-----------------|------------|----------|----------------|-----------|-----------|-------------------------|------|------------------------|-------|-------------------------------------|
| 0 of 15 selected  |                 |            |          |                |           |           |                         |      |                        |       |                                     |
| All Active Staff   |                 |            |          |                |           |           |                         |      |                        |       |                                     |
| Name   | Type            | Department | Homeroom | HomePhone      | WorkPhone | CellPhone | Email1                  | User | School > Name          | Login |                                     |
| <input type="checkbox"/>   | Dickson, Sharyl | Teacher    | HR 101   | (250) 555-0721 | 5551212   | 5551212   | Sharyl.Dickson@sd.bc.ca | N    | Chief Tomat Elementary |       | <input checked="" type="checkbox"/> |
| <input type="checkbox"/>   | Durance, Ed     | Teacher    | HR 102   | (250) 555-3674 | 5551212   | 5551212   | Ed.Durance@sd.bc.ca     | N    | Chief Tomat Elementary |       | <input type="checkbox"/>            |
| <input type="checkbox"/>   | Edgar, Sacha    | Teacher    | HR 103   | (250) 555-7438 | 5551212   | 5551212   | Sacha.Edgar@sd.bc.ca    | N    | Chief Tomat Elementary |       | <input type="checkbox"/>            |
| <input type="checkbox"/>   | Emery, Arika    | Teacher    | HR 104   | (250) 555-2048 | 5551212   | 5551212   | Arika.Emery@sd.bc.ca    | N    | Chief Tomat Elementary |       | <input type="checkbox"/>            |
| <input type="checkbox"/>   | Ewert, Deanna   | Teacher    |          | (250) 555-6129 | 5551212   | 5551212   | Deanna.Ewert@sd.bc.ca   | N    | Chief Tomat Elementary |       | <input type="checkbox"/>            |

### 8.8.2 Assigning Homerooms to multiple students:

#### 8.8.2.1 Option 1: Modify List

School > Student > Field Set including the Homeroom field

- Select the students for a single homeroom
- Options > Show selected
- Confirm the correct students are listed
- Options > Mass Update

Repeat as required for all homerooms, setting the filter to All Students to select the next group.

## 9.0 Grade Management

Grade Term Cover Maps Grade term cover maps tell the application which grade term that a particular schedule term applies to. For example, a full-year schedule term gets reported on in every term, so all boxes in the grade term cover map would be checked. A 9-week or 12-week course may be reported on in only one of the terms and so the appropriate box for that schedule term would be checked to reflect which term it fits into. It is important to review these before preparing grade input.



1. In the School view, click the Schedule top tab.
2. Click the Structure side tab, which will now display the Terms sub-side tab.
3. Click on each schedule term and ensure the Grade term cover map boxes are checked appropriately.

**Example of a common elementary school setup:** An elementary school will typically have only one schedule term of Full Year. All boxes of the grade term cover map should be checked because all grades are reported in every term of the year.

Example of a common secondary school setup: In this example, the secondary school is sending report cards four times per year (Quarterly). A secondary school will have the grade term cover map boxes checked as appropriate for the terms in which that course would report. For example, a semester course only has the first two or last two boxes checked depending on which semester the course falls in.

| Schedule Terms           |                      |   |
|--------------------------|----------------------|---|
| <input type="checkbox"/> | Code                 | Name  |
| <input type="checkbox"/> | FY                   | FY  |
| <input type="checkbox"/> | S1                   | S1  |
| <input type="checkbox"/> | S2                   | S2  |
|                          | Grade term cover map | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> |
|                          | Grade term cover map | <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>                       |
|                          | Grade term cover map | <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>                       |

**Examples of a K-12 school setup:**

**MyEducation BC** has been adjusted so K-12 schools can associate more than one grade term definition to a schedule term. This will result in the appropriate columns being created for each term, regardless of whether the course is reported on 3 times per year or 4 times per year.

Full Year schedule term example:

The screenshot shows the 'Schedule Terms' configuration page for a Full Year (FY) term. The 'Terms' menu item is highlighted in red. The form fields are as follows:

|                      |  |
|----------------------|--|
| Code                 | FY   |
| Name                 | FY   |
| Base terms per year  | 1  |
| Term map             | <input checked="" type="checkbox"/>  |
| Term Date Ranges     | Start: 9/3/2014, End: 6/30/2015  |
| Grade term cover map | Standard Trimester Grades: <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/><br>Standard Quarterly Grades: <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> |

Semester schedule term example:

The two screenshots show the configuration for Semester 1 (S1) and Semester 2 (S2) terms. The 'Grade term cover map' sections are highlighted in red.

|                      |   |
|----------------------|---|
| Code                 | S1  |
| Name                 | Semester 1  |
| Base terms per year  | 2   |
| Term map             | <input checked="" type="checkbox"/> <input type="checkbox"/>  |
| Term Date Ranges     | Start: 9/3/2014, End: 1/30/2015   |
| Grade term cover map | Standard Trimester Grades: <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/><br>Standard Quarterly Grades: <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |

|                      |   |
|----------------------|---|
| Code                 | S2  |
| Name                 | Semester 2  |
| Base terms per year  | 2   |
| Term map             | <input type="checkbox"/> <input checked="" type="checkbox"/>  |
| Term Date Ranges     | Start: 2/2/2015, End: 6/30/2015   |
| Grade term cover map | Standard Trimester Grades: <input type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/><br>Standard Quarterly Grades: <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> |

Setting up a grid similar to the example below may help K-12 schools determine what grade terms different schedule terms are reported on. For example, if the Semester length courses are only assigned to high school students who are reported on four times per year, then the first two Standard Trimester Grades boxes for the semester schedule terms must be checked.

| Schedule Term  | Course Start Date | Course End Date | Grade Term Q1<br>Sep 8 - Nov 13 | Grade Term Q2<br>Nov 14 - Jan 29 | Grade Term Q3<br>Jan 20 - Apr 14 | Grade Term Q4<br>Apr 15 - Jun 29 |
|----------------|-------------------|-----------------|---------------------------------|----------------------------------|----------------------------------|----------------------------------|
| Full Year      | Sep 8 2015        | Jun 29 2016     | x                               | x                                | x                                | x                                |
| Semester 1     | Sep 8 2015        | Jan 29 2016     | x                               | x                                |                                  |                                  |
| Semester 2     | Jan 30 2016       | Jun 29 2016     |                                 |                                  | x                                | x                                |
| Tri 1: 12-week | Sep 8 2015        | Dec 4 2015      | x                               | x                                |                                  |                                  |
| Tri 2: 12-week | Dec 5 2015        | March 11 2016   |                                 | x                                | x                                |                                  |
| Tri 3: 12-week | Mar 12 2016       | Jun 29 2016     |                                 |                                  | x                                | x                                |
| Q1: 9-week     | Sep 8 2015        | Nov 13 2015     | x                               |                                  |                                  |                                  |
| Q2: 9-week     | Nov 14 2015       | Jan 29 2016     |                                 | x                                |                                  |                                  |
| Q3: 9-week     | Jan 30 2016       | Apr 14 2016     |                                 |                                  | x                                |                                  |
| Q4: 9-week     | Apr 15 2016       | Jun 29 2016     |                                 |                                  |                                  | x                                |

| Schedule Term  | Course Start Date | Course End Date | Grade Term Tri 1<br>Sep 8 - Dec 18 | Grade Term Tri 2<br>Dec 19 - Mar 11 | Grade Term Tri 3<br>Mar 12 - Jun 29 |
|----------------|-------------------|-----------------|------------------------------------|-------------------------------------|-------------------------------------|
| Full Year      | Sep 8 2015        | Jun 29 2016     | x                                  | x                                   | x                                   |
| Semester 1     | Sep 8 2015        | Jan 29 2016     | x                                  | x                                   |                                     |
| Semester 2     | Jan 30 2016       | Jun 29 2016     |                                    | x                                   | x                                   |
| Tri 1: 12-week | Sep 8 2015        | Dec 4 2015      | x                                  |                                     |                                     |
| Tri 2: 12-week | Dec 5 2015        | March 11 2016   |                                    | x                                   |                                     |
| Tri 3: 12-week | Mar 12 2016       | Jun 29 2016     |                                    |                                     | x                                   |
| Q1: 9-week     | Sep 8 2015        | Nov 13 2015     | x                                  |                                     |                                     |
| Q2: 9-week     | Nov 14 2015       | Jan 29 2016     | x                                  | x                                   |                                     |
| Q3: 9-week     | Jan 30 2016       | Apr 14 2016     |                                    | x                                   | x                                   |
| Q4: 9-week     | Apr 15 2016       | Jun 29 2016     |                                    |                                     | x                                   |

## 10.0 Preparing Grade Input

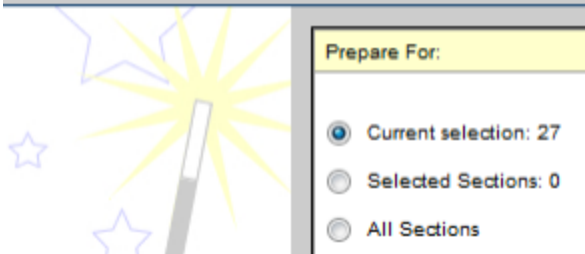
Preparing grade input is the process of creating the columns that users will see for entering dates, grades, work habits and comments for the report card. If grade input is not prepared, users will have not have fields to enter data into.

K-12 schools using both quarter and trimester grade terms will have warnings that columns were not prepared for certain grade terms that do not match the transcript definitions on the courses displayed in the list. This is not problematic, but may be confusing for users. Consider create a filter that can be used prior to preparing grade input to avoid these messages appearing. Appendix B contains a suggestion for creating a query that can be saved as a filter.

### 10.1 To Prepare Grade Input

1. In the **School** view, click on the **Grades** top tab.
2. Click on the **Grade Input** side tab. You will only see classes that have students in them.
3. In the Options menu, select **Prepare Grade Input**. This launches a wizard.
4. Use the selection tools to choose which sections you want to prepare grade input for. If your school's master schedule is mostly settled for the year, there is no harm in preparing grade input for all sections. Click **Next**.

## Prepare Grade Input: Select Sections



Prepare For:

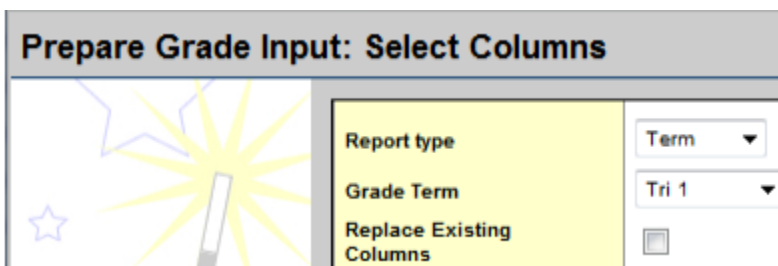
- Current selection: 27
- Selected Sections: 0
- All Sections

5. Choose the **Report type** of **Term**.

6. Choose the **Grade Term** you are preparing.

7. **Replace Existing Columns** should never be done once grade data has been entered and posted for a student. **Read the warning!** Checking this box will delete all data entered for the term selected. There are very few circumstances where this would be done.

8. Click **Next**.



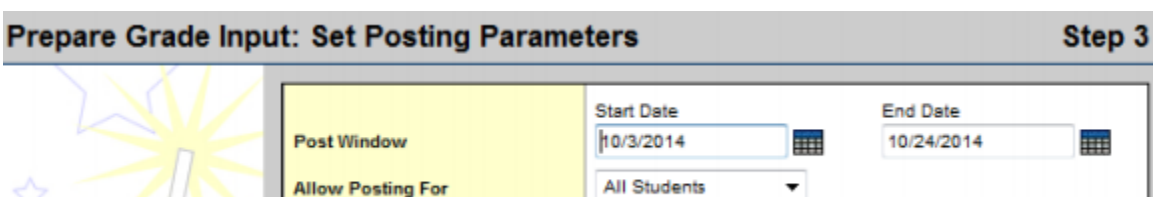
Report type: Term

Grade Term: Tri 1

Replace Existing Columns:

9. Enter the **Post Window** dates. This reflects the period of time for which you want users to be able to enter data. Once the **End Date** has passed, all changes would need to be made at the office.

10. **Allow Posting For** should be left to **All Students**. Click **Next**.



Post Window: Start Date: 10/3/2014, End Date: 10/24/2014

Allow Posting For: All Students

11. In Step 4 of the wizard, confirm the information is correct.

12. Click **Finish**.

### 10.2 Grade Post Controls

These are created when you prepare grade input. Grade post controls are the windows of time set for your staff to be able to enter marks. Once the end date passes, all mark changes have to be made through the office.

To adjust the end date of a grade post control:

1. In the **School** view, select the **Grades** top tab.
2. Click on the **Grade Post Controls** side tab.
3. Click on the blue hyperlink for the **GradeTerm > ID** to be adjusted.
4. Adjust the **Start date** or **End date** as necessary.
5. Click **Save**.

## 11.0 Course Dates for DL & CE and High Schools

### 11.1 Preparing Grade Input for Course Dates

In addition to preparing grade input for terms to enable grade entry, High Schools, DL and CE schools will need to prepare grade input for course dates. This is necessary to create the columns for entering course dates relevant to DL and CE schools and create date columns in transcript records required for grade 10-12 Ministry reporting and graduation reports.

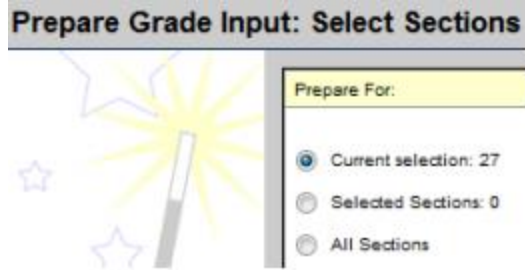
The course date columns that are created are:

- **Start Date:** The course start date based on the schedule record for the course section.
- **Actual Start Date:** The date the student was scheduled into the course section.
- **Active Date:** The date the student has met the requirements to be counted for funding.
- **% Complete:** The percentage of the course the student has completed at the time of posting.
- **Completion Date:** The date the student completed the course. This will be automatically populated in grade input when a Final mark is entered and grades are posted. The date is posted to the transcript when dates are posted for the course.
- **End Date:**

The course end date based on the schedule record.

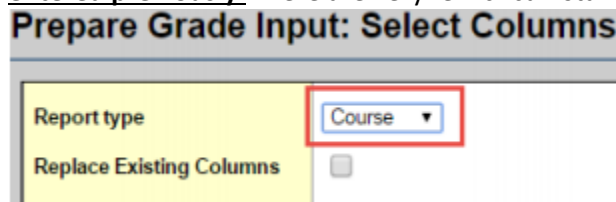
To **prepare grade input** for course dates:

1. In the **School** view, click on the **Grades** top tab.
2. Click on the **Grade Input** side tab. You will only see classes that have students in them.
3. In the **Options** menu, select **Prepare Grade** Input. This launches a wizard.
4. The Select Sections portion of the wizard allows the user to define which sections to include in Prepare Grade Input for course dates.



5. Choose the **Report type** of **Course**. The Grade Term selection disappears as the terms are not relevant to course dates.

6. **Replace Existing Columns** should never be done once data has been entered and posted for a student. **Read the warning! Checking this box will delete any dates entered previously.** There are very few circumstances where this would be done.



7. Click **Finish**.

## 11.2 Entering Course Dates – DL and CE Schools

Course start dates, active dates and completion dates all provide necessary information for 1701 and SADE extracts for DL schools. Entering and posting course dates will cause a student transcript record to be created with the dates that have been entered.

Standard schools with grade 10-12 students do not need to populate active dates – the process of posting course dates will populate the course start and end dates based on the schedule term associated to the course section.

Note: The course dates do not observe the grade post controls the way term grades do. Course dates can be entered and posted at any point during the school year, even if the push pins are black.

To populate course dates:

1. In the **School** view, select the Grades top tab.
2. Click the **Grade Input** side tab and click the blue hyperlink for the course with dates to be posted. This will produce the **Input Grid**.
3. Set the **Grade Columns** drop-down to **Post Columns - Course**
4. Enter the applicable dates.

**Classes :: MAF--11-4L-01 - CP - ART FOUNDATIONS 11**

| Grade Terms                  | Student Fields     | Grade Columns         | Term       | Status     |            |            |
|------------------------------|--------------------|-----------------------|------------|------------|------------|------------|
| Transcripts                  | Default Fields     | Post Columns - Course | All        | En         |            |            |
| Transcript Column Attributes | Name               | YOG                   | StartDate  | ActiveDate | % Complete | Completion |
| Calculation Overrides        | McDowell, Catriona | 2017                  | 08/09/2015 | 13/10/2015 |            |            |
|                              | Average score      |                       |            |            |            |            |

**Note:** The Active Date is populated automatically when a teacher enters a first assignment mark. The Completion date will be populated automatically in the grade input grid when a final mark is entered and grades are posted for the course. Posting dates will then populate the transcript record with all entered dates. All fields can be populated, modified or deleted and posted by a teacher or office admin staff.

### 11.3 Posting Course Dates

Course dates are created in student transcript records when they are either manually entered on the transcript records or when staff “Post course dates” from the Grade Input screen (Gradebook).

#### To post course dates:

##### By individual course

1. In the **School view**, select the **Grades** top tab.
2. Click the **Grade Input** side tab and click the blue hyperlink for the course with dates to be posted. This will produce the **Input Grid**.
3. Enter the necessary dates.
4. In the **Options** menu, select **Post Grades**.
5. In the *Post Grades* pop-up window, check the box or **Post course dates**. The Grade Term box will go blank as the terms are not relevant to course dates.
6. **Grades to post** will change to Course dates for all students

**Post Grades**

Class: MADER09-01 Electronics and Robotics 9

Post course dates

Grade Term:

Grades to post: Course dates for enrolled

7. Click **OK**.

**NOTE:** If there are students in the withdrawn tab of the course section that have dates in the date columns, warning messages may appear when posting Course Dates. These messages only apply to posting **GRADES**, *not* posting dates. **Course Dates in BC will not post from the withdrawn tab of grade input.** Therefore bypass the messages selecting either Yes or No. No transcript record(s) will be updated or created regardless of the selection made. See section 9.1.2 for details on the grade post messages that appear.

**For multiple courses:** This assumes all necessary dates have been entered into the input grid for each course.

1. In the **School** view, select the **Grades** top tab.
2. Click the **Grade Input** side tab.
3. In the **Options** menu, select **Post Grades**.
4. In the Post Grades pop-up window, check the box or **Post course dates**. The Grade Term box will go blank as the terms are not relevant to course dates.
5. **Grades to post** will change to **Course dates for all students**.

**Post Grades**

Post course dates

Grade Term

Grades to post **Course dates for enrolled**

Post For...

Current selection: 1

All Classes

OK  Cancel

6. Click **OK**.

**NOTE:** If there are students in the withdrawn tab of the course section that have dates in the date columns, warning messages may appear when posting Course Dates. These messages only apply to posting **GRADES**, *not* posting dates. **Course Dates in BC will not post from the withdrawn tab of grade input.** Therefore bypass the messages selecting either Yes or No.



## 11.4 Adjusting Course Dates After Initial Posting

The dates, or blank values, in the course dates input grid will overwrite any manual changes to the transcript record the next time dates are posted for the course section.

If changes to course dates are required, it is recommended that the change be made in the grade input grid for the course and re-posted. This will update the student transcript record with the new date and keep the data stream intact. The process listed below should only be used with the full understanding that it requires an additional process to update the input grid after changes are made.

### To adjust course dates for multiple or random records:

1. In the **School** view, select the Grades top tab.
2. Select the **Transcripts** side tab.
3. Set the dictionary icon to **All**.
4. Set the field set selection to **Active Dates**. This will display the course dates.
5. In the **Options** menu, select **Modify List**.
6. Click the pencil icon at the top of the column to activate the dates for the column to be updated. Populate the dates as required.
7. Click the green check mark to save the entries.
8. Repeat for other date columns as necessary.

Note: The Options > **Mass Update** function can also be used, but should be used with great care as date fields can only be updated to contain a value or to change a value. They cannot be changed back to blank, using the mass update function.

If course dates are populated en masse through the Grades top tab > Transcripts side tab, it is important to know that this does not automatically populate the Grade Input grid with these values. Therefore, the **Update Gradebooks** function should be used to push these dates back to the grade input grid to avoid them being overwritten by blanks or previously entered values if course dates are posted from the Grade Input grid at a later date.

## 12.0 Grade Input

Grade input refers to the process of entering grades, comments and work habits for students. This can be done by office users through the **School** view, or by teachers, through the **Staff** view.

### 12.1 School View

School users entering grades and/or dates can do so using School view. Grades are entered in the Grade Input screen and then posted to the transcript records.

#### 12.1.1 Entering Grades

1. In the **School** view, select the **Grades** top tab.

2. Select the class by clicking the check box beside the course and clicking the **Input Grid** leaf, **OR** click the blue hyperlink of the course. This will take you to the class list with students for grade entry.

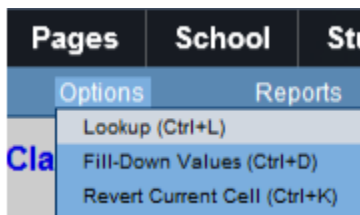
3. Enter grades, work habits and comments as appropriate. Data is automatically saved.

**Quick Tips:** Use the Options menu for shortcuts available for entering data, or use the quick keys.

**Lookup (Ctrl+L):** shows the user the valid values that can be entered into that field, if defined.

**Fill-Down Values (Ctrl+D):** takes the value in the cell the user is in and copies it down to all students below that cell.

**Revert Current Cell (Ctrl+K):** returns the cell value to the previously entered value.



For transcript definitions with a calculation, an “Update” button will appear in the Final column in the final reporting period for courses. Clicking the Update button will populate the final grade according to the calculation in the transcript definition.

Manual changes made to a grade for a student will appear with a blue exclamation mark beside them. This indicates to the teacher that admin staff have entered or modified the grade.

### 12.1.1.2 Posting Grades

Once all grades are entered, they must be posted to create the transcript record for the student. This becomes the official term mark for the students. Grades can be posted by individual class or all classes at once.

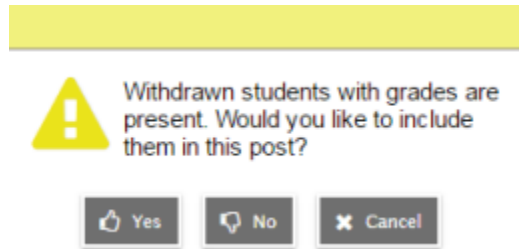
If a mark change is made after grades have been posted, the user must post grades again to update the transcript record.

#### 12.1.2.1 Posting Grades By Individual Classes:

1. In the School view, select the Grades top tab.
2. Select the class by clicking the check box beside the course and clicking the Input Grid leaf, OR click the blue hyperlink of the course. This will take you to the class list with students for grade entry.
3. Confirm grade entry is complete.
4. In the Options menu, select Post Grades. Confirm the correct Class is displayed.
5. Select the appropriate Grade Term.

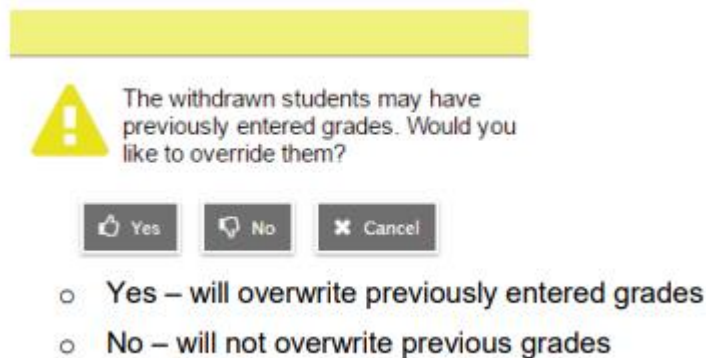
6. Grades to post should be Term grades for all students. Click OK.

- If there are student(s) in the withdrawn tab of the course section with a grade entered for the term, this warning message will appear:



**NOTE:** This selection will apply to ALL students in the withdrawn tab


- ♣ **Yes** – will post grades for withdrawn student(s). Creates a transcript record for a student if one does not already exist. Selecting yes may present a second option if grades were entered previously:



- ♣ **No** - does not post grades to transcripts for withdrawn students, and will not create a transcript record if one does not already exist.


#### *12.1.2.2 Posting Grades For All Classes:*

1. In the School view, select the Grades top tab.
  2. Click on the Grade Input side tab.
  3. In the Options menu, select Post Grades.
  4. Select the appropriate Grade Term.
  5. Grades to post should be Term grades for all students.
  6. In the "Post for..." section, select either Current Selection or All Classes. Click OK.
- If there are student(s) in the withdrawn tab of the selected course section(s) with a grade entered for the term, this warning message will appear:

 Withdrawn students with grades are present. Would you like to include them in this post?

**NOTE:** This selection will apply to ALL students in the withdrawn tab of the selected sections

♣ Yes – will post grades for withdrawn student(s). Creates a transcript record for a student if one does not already exist. Selecting yes may present a second option if grades were entered previously:

 The withdrawn students may have previously entered grades. Would you like to override them?

- Yes** – will overwrite previous grades
- No** – will not overwrite previous grades

### 12.1.3 Viewing the Data

Data can be viewed in the following areas of the School view:

- By individual course: Grades top tab > Grade Input side tab > Input Grid.
- By all courses: Grades top tab > Transcripts side tab > set dictionary icon to All.
  - ♣ This area can also be used to create queries for specific records.
  - ♣ Queries can be made on one or more students, teachers, courses, or sections.
- By individual student: Student top tab > Transcript side tab.

### 12.2 Staff View

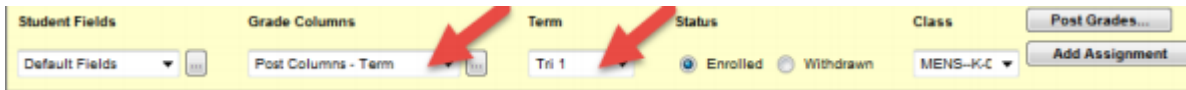
There are two ways for a teacher to enter a term grade for a report card:

- Entering a term grade directly to term grade screen for report cards. (Teacher manages daily assessment outside of MyEducation BC).
- Posting grades from teacher-created categories and assignments. (Teacher uses MyEducation BC to manage daily assessment). Entering a Term Grade Directly to the Term Grade Screen.

1. From **Staff** view, **Gradebook** top tab and the Scores side tab.

2. In the **Grade Columns** field, choose **Post Columns – Term**.

3. In the **Term** field, choose the appropriate term for which grades are being entered.



♣ **Black** pushpins with no shape beside them appear in the column headers prior to the dates defined for mark entry and appear in the Grade Post Controls.

♣ **Green** pushpins with a triangle beside them appear **during** the dates defined for mark entry. This lets the teacher know that the grade post window is open and they can enter marks and post them.

♣ **Red** pushpins with a red square beside them appear when the Post button has been pushed and grades have been posted to the student record. Even if the pushpins are red, grades can be re-posted as long as school settings permit it.

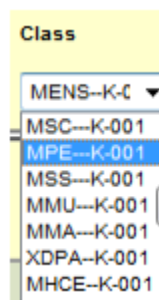
4. Enter grades, work habits and comments as appropriate. Data is automatically saved. **Quick Tip:** Use the Options menu for shortcuts available for entering data, or use the quick keys.

- **Lookup (Ctrl+L):** shows the user the valid values that can be entered into that field, if defined.
- **Fill-Down Values (Ctrl+D):** takes the value in the cell the user is in and copies it down to all students below that cell. This works for comments as well as grades.
- **Revert Current Cell (Ctrl+K):** returns the cell value to the previously entered value.

For transcript definitions with a calculation, an “Update” button will appear in the Final column in the final reporting period for courses. Clicking the Update button will populate the final grade according to the calculation in the transcript definition.

5. When data entry is complete, click the button. This process creates the grade record for the student which will appear on the report card.

6. Use the Class dropdown menu to select the next class.



7. Repeat process until grades are entered for all classes.

### 12.2.1 Posting Grades From Teacher-created Categories and Assignments

Posting Grades from teacher created categories and assignments is covered in the Gradebook & Staff View guide on the MyEducationBC.info site.

## 13.0 Generating Report Cards

Report cards can be run from various areas in **MyEducation BC** for all students or for an individual student.

- **School view > Grades top tab > Transcript side tab > Reports menu > Report Cards category >** select the appropriate report card: for all students.
- **School view > Student top tab > Reports menu > Report Cards category >** select the appropriate report card: for all or a selection of multiple students.
- **School view > Student top tab > Transcript side tab > Reports menu > Report Cards category >** select the appropriate report card: for an individual student.

### 13.1 Kindergarten, Primary, Intermediate

Selecting the appropriate Report Card Type will present the appropriate performance scale or term grade boxes for that particular group of students.

Elementary schools using the XTC course for term comments must check the “Include term comments” checkbox for this course to be displayed at the bottom of the report card.

See the table below for an explanation of the selections on the report card parameter form.

| Field  | Description  |
|--|--|
| <b>Report Card Type</b>                          | Select the report card required for the grade level of students to ensure the correct performance scale is displayed.<br><b>Kindergarten:</b> Kindergarten<br><b>Primary:</b> Grades 1, 2, 3<br><b>Intermediate:</b> Grades 4+   |
| <b>School year</b>                               | This will default to the current school year.  |
| <b>Term</b>                                      | Select the term for which report cards are being run. These values are populated by the grade terms set up in Grades top tab > Grade Terms side tab.   |
| <b>Students to include</b>                       | <b>Current selection:</b> the report will run for all students in the student list when you selected the report.<br><b>All:</b> the report will run for all students.<br><b>YOG:</b> the report will run for all students with a specified YOG.<br><b>Snapshot:</b> the report will run for the students in the snapshot identified in the Search value field. |
| <b>Search value</b>                              | Contains the value to apply when running the report by YOG or Snapshot. This is a free-form, typed-in value and must be exactly as the data on the student record is displayed.  |
| <b>Alternate mailings</b>                        | This has no functionality at this time.  |
| <b>Exclude classes without term grades</b>       | This will exclude any courses on the student schedule that do not have a mark or comment.  |
| <b>First Name Format</b>                         | Determines whether the preferred or legal first name will be displayed on the report card.   |
| <b>Last Name Format</b>                          | Determines whether the preferred or legal last name will be displayed on the report card.  |
| <b>Display School Message</b>                    | This box must be checked to display the report card message entered in School top tab > Setup side tab > Preferences > Category = Grade > Report card message.   |
| <b>Parent Signature Required</b>                 | Checking this box will cause the report to have a parent signature box at the bottom.  |
| <b>Print on Both Sides</b>                       | Checking this box will insert a spare page where the report card exceeds 2 pages. For example, this will prevent the third page from printing with the first page of another student.  |
| <b>Include Term Comments</b>                     | Check this box to generate a term comment box at the bottom of the report card when using the XTC course.  |
| <b>Hide Performance Scale if no Mark Entered</b> | If no performance scale has been entered for a course at the Kindergarten or Primary levels, the performance scale bar will be omitted from the report card for that course if this box is checked.  |
| <b>Print Performance Scale</b>                   | The top of the report card will display an explanation of the performance scale associated with the report card type at the top.   |
| <b>French Language</b>                           | Generates the report card in the French language.<br><b>Note:</b> It does not translate data entered into the system in English.   |
| <b>Print on Legal Size Paper</b>                 | Causes the report to be generated on legal size paper.   |
| <b>Format</b>                                    | Provides options to generate the report card in different formats. PDF is recommended.   |

## 13.2 Middle Years and Secondary

| Field                                      | Description  |
|--|--|
| <b>Report Card Type</b>                    | Select the report card required for the grade level of students:<br><b>Middle:</b> displays letter grades only when the report card is run.<br><b>Secondary:</b> displays letter grade and percentages when the report card is run.  |
| <b>School year</b>                         | This will default to the current school year.  |
| <b>Term</b>                                | Select the term for which report cards are being run.  |
| <b>Students to include</b>                 | <b>Current selection:</b> the report will run for all students in the student list when you selected the report.<br><b>All:</b> the report will run for all students.<br><b>YOG:</b> the report will run for all students with a specified YOG.<br><b>Snapshot:</b> the report will run for the students in the snapshot identified in the Search value field. |
| <b>Search value</b>                        | Contains the value to apply when running the report by YOG or Snapshot. It is important to note that this is a free-form, typed-in value and must be exactly as the data on the student record is displayed.   |
| <b>Alternate mailings</b>                  | This has no functionality at this time.  |
| <b>Exclude classes without term grades</b> | This will exclude any courses on the student schedule that do not have a mark or comment.  |
| <b>First Name Format</b>                   | Determines whether the preferred or legal first name will be displayed on the report card.   |
| <b>Last Name Format</b>                    | Determines whether the preferred or legal last name will be displayed on the report card.  |
| <b>Suppress Course Teacher Name</b>        | Checking this box will prevent the teacher's name from being displayed beside the course on the report card.   |
| <b>French Language</b>                     | Generates the report card in the French language.<br><b>Note:</b> It does not translate data entered into the system in English.   |
| <b>Display School Final Exam</b>           | Checking this box will display the school final exam mark, if a transcript definition with a school final exam column was used.  |
| <b>Include Blended Mark if Available</b>   | Checking this box will display a blended mark for the course if the mark has been pushed to the transcript record exam field in MyEd BC.   |
| <b>Print on Both Sides</b>                 | Checking this box will insert a spare page where the report card exceeds 2 pages. For example, this will prevent the third page from printing with the first page of another student.  |
| <b>Print Info Page</b>                     | The bottom of the report card will display an explanation of the letter grades associated with the report card.  |
| <b>Display Attendance Summary</b>          | If this box is checked, the daily attendance summary will show at the top of the report card. If it is unchecked, only class attendance will display on the course against which it was recorded.  |
| <b>Display School Message</b>              | This box must be checked to display the report card message entered in School top tab > Setup side tab > Preferences > Category = Grade > Report card message.   |
| <b>Teacher Signature Required</b>          | Checking this box will cause the report to have a teacher signature box at the bottom.   |



|   |   |
|---|---|
| <b>Parent Signature Required</b>                              | Checking this box will cause the report to have a parent signature box at the bottom.   |
| <b>Include Term Comments</b>                                  | Check this box if the XTC course has been used to generate a term comment box at the bottom of the report card. This functionality is specific to the XTC course. |
| <b>Display GPA</b>  | Displays a system-generated GPA when the report card is run.  |
| <b>Include Behaviour, Attitudes and Social Responsibility</b> | If this box is checked, XSR course will display at the bottom of the report card for the middle school report card.   |
| <b>Print on Legal Size Paper</b>                              | Causes the report to be generated on legal size paper.  |
| <b>Format</b>   | Provides options to generate the report card in different formats. PDF is recommended.  |

## 14.0 Other Functions

### 14.1 Update Gradebooks

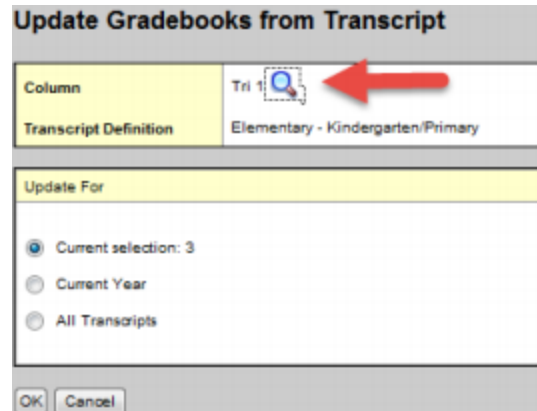
This is an optional function that can be used as part of updating marks in the transcript record.

**Recommended practice is to make the grade in the grade input grid and re-post the grades/comments/work habit changes for the course.** This will update the applicable transcript record(s) accordingly.

This function pushes any changes made directly on the student transcript record in the School view, back to the teacher gradebook's **term grade** screen. If you make manual changes to term grades in the Transcript screen, they are not automatically reflected in the teacher's screen. Teachers should be aware of this process before it is executed as it will affect the marks they see in their term screen. This process does not reach back into the actual teacher gradebook where individual assignment marks are recorded.

To update gradebooks:

1. In the **School** view, select the **Grades** top tab.
2. Click on the **Transcripts** side tab.
3. Select all records that have been changed.
4. From **Options** menu, choose **Show Selected**.
5. From **Options** menu, choose **Update Gradebooks**.
6. In the Update Gradebooks from Transcript window:
  - ♣ Select the correct transcript definition and column from the pick list. For example: you may be updating the Tri 1 grade for courses with an Elementary – Kindergarten/Primary transcript definition.
  - ♣ Confirm the Current Selection reflects the number of records you selected to update.



7. Click OK.

## 14.2 Calculate Credits

When an administrative staff member posts final grades in the School view, credits are not automatically calculated. The Calculate Credits function will populate the credit value based on the system credit procedure.

To calculate credits:

1. In the **School** view, select the **Grades** top tab.
2. Click the **Transcripts** side-tab.
3. Select the records requiring a credit value.
4. In the **Options** menu, select **Calculate Credits**. The Calculate Credits dialog box appears.
5. Choose the appropriate option to calculate credits for the current selection or for all transcript records.
6. Click **OK**. The system will assign credit values based on the system credit procedure rules.

## 15.0 TRAX

### Overview

The transfer of demographic and course data between schools and the Ministry is necessary for the administration of provincial exams and graduation assessments. The Ministry uses this information to produce transcripts of grades and school completion certificates on behalf of schools.

This reference guide will provide users with the knowledge required to successfully perform these functions using MyEducation BC.

### 15.1 Objectives

Topics covered will include:

- TRAX process and timeline
- How to create Provincial Exams

- How to create Graduation Assessments
- How to produce a TRAX extract in MyEducation BC
- Description of the three types of files created by a TRAX Extract: CRS, DEM and XAM Files.
- Scenarios that schools will encounter for reporting TRAX and how to ensure information is entered correctly for each. These scenarios include:
  - ♣ Deferrals
  - ♣ Adult
  - ♣ Challenge
  - ♣ Rewrites
- How to review Student Exam Results

## 15.2 Procedures

There are four procedures related to TRAX:

- **Posting Course Dates** procedure: creates a transcript record, sets start and end dates for courses submitted to TRAX.
- \* **Course Exam Synchronize** procedure: adds/deletes exam records for students with examinable courses.
- \* **Blended Marks to Transcripts** procedure: updates the transcript record with the blended/exam marks found on the assessment table
- **Calculate Credits...** procedure: assigns credits for all completed courses including examinable courses that have a passing mark / blended mark

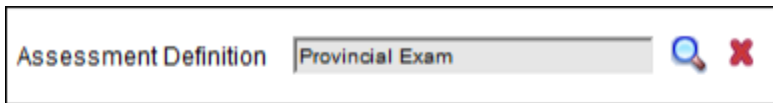
\*these procedures only apply to the provincial exams and are not required for the graduation assessments.

## 15.3 Key Points

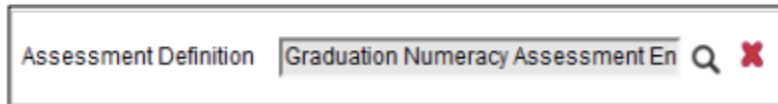
- Assessment records create provincial exam requests and store the Blended and Exam marks.
- Assessment records create graduation assessment requests and store the results
- Assessment records are where the results are uploaded when they are received from the Ministry of Education.
- Provincial exam records should only **ever** be created through the Course Exam Synchronize Procedure. This creates the correct link between the course and exam records for the subsequent mark uploads and Blended Marks to Transcript procedure.
- The Course Exam Synchronize Procedure will look at the students' schedules and transcript screens and create the appropriate Provincial Exam assessment records (exam requests). It will

also delete Provincial Exam assessment records where a student has dropped a course or the course has been removed from the student transcript records.

- All courses need End Dates. Non-examinable courses need end dates for the CRS file. Examinable courses need end dates to determine the Exam Session Date on the Assessment record. If a student transcript record exists, the course End Date is taken from that record. If no transcript record exists, End Dates are taken from the school's course structure values.
- Students who completed a course in a previous year and are writing the exam in the current year, need an Assessment record with a current year exam session date. If the student has not written the exam previously, edit the session date and location information for Session 1. If the Student is rewriting the exam, enter the session date, location and mark information in Session 2 fields.
- **Always select the appropriate definition** in the Assessment Definition area to see all the fields and filters for any provincial exam or graduation assessment



Assessment Definition Provincial Exam



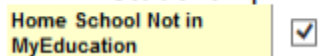
Assessment Definition Graduation Numeracy Assessment En

- Assessment records will always be associated with the school the student is taking the course in. The Location may need to be changed for where the exam is going to be written.
- Students must have a **Primary Program of Study** assigned which will define graduation requirements for the student. The Primary program study checkbox must be checked in the Program of Study details. The TRAX extract, School Transcript and DVR reports will not run correctly without a Primary Program of Study attached to the student. See Enrolment Management and Student Demographics for details on assigning the program to the student details.

### 15.3.1 Who is Included in the TRAX Extract?

The student's primary school is responsible for reporting achievement to TRAX. In order for the MyEducation BC system to exclude students from the TRAX extract all students whose home school is not in MyEducation BC, must have the "Home School Not in MyEducation" checkbox checked. This field is located at:

**School view > Student top tab > Details side tab > Demographics sub-top tab**



Home School Not in MyEducation

1. When a student is withdrawn or deceased, TRAX extract will create the DEM record and any XAM records for the student (but NOT CRS records).
2. Multiple XAM and CRS records are created based on the students' courses and whether or not a course has an assessment associated to it.

3. All courses are reported only once per student, either in the XAM or CRS record.
4. If a student is enrolled in an examinable course more than once within a school year, the system will create records for all occurrences when the course exam synchronization procedure is run.

#### *15.3.1.1 The DEM File:*

One demographic record will be created for students (including withdrawn students), who are:

- Enrolled in Grade 10, 11, 12, SU and GA, or
- Registered in the Adult Graduation Program, or
- Enrolled in a grade less than 10, but registered in a provincially examinable course in the current school year and scores (returned) are blank, or
- Enrolled in a grade less than 10, but registered in non-examinable grade 10, 11, 12 courses, or
- Registered in the School Completion Certificate Program ('SCCP').
- Does not have the Home School not in MyEducation checkbox checked

#### *15.3.1.2 The CRS File:*

Course records will be created for non-examinable courses for students who are:

- Enrolled in Grade 10, 11, 12, SU and GA
- Registered in the Adult Graduation Program
- Registered in the SCCP Program (School Completion Certificate Program).
- Enrolled in Grade 08 or 09, but completed/enrolled non-examinable grade 10, 11, or 12 courses

For the above students, all completed and currently enrolled non-examinable courses that are at the grade level 10, 11, 12, SU or GA will be extracted.

#### *15.3.1.3 The XAM File:*

Exam records will be created for students who are:

- Enrolled in Grade 10, 11, 12, SU and GA with assessment records for provincially examinable courses in the current year.
- Enrolled in Grade 10, 11, 12, SU and GA with graduation assessment records for the current year.
- Registered in the Adult Graduation Program who have opted to write the exam and have assessment records for provincially examinable courses in the current year.
- Enrolled in Grade 08 or 09, but completed/enrolled examinable grade 12 courses and have assessment records for provincially examinable courses in the current year.

## TRAX Process Summary

### First Submission

Tasks are displayed in the order normally associated with the TRAX process.

| Timeline                                     | Task  | Path  | Resource   |
|--|---|---|--|
| Aug/Sep                                      | Schedule students into courses – ensure all students are scheduled into their courses, including provincially examinable courses.   | Student top tab > Schedule side tab   | Student Scheduling   |
| Sep/Oct                                      | Remove current year "orphaned" transcript records, if applicable.<br>This will happen when a student changes schools and the transcript record for a course has been created, but does not have an equivalent scheduled course in the student schedule.   | Grades top tab > Transcripts side tab > set dictionary icon to All > set filter to No Student Schedule Equivalent.<br>In the pop-up,<br>Set School Year field to the current school year.<br>Set Search based on to Final Mark is Empty<br>Review the records and if there is no final mark and it is appropriate, delete these "orphaned" records. | TRAX reference guide   |
| Sep/Oct                                      | Ensure manually entered transcript records have an appropriate final mark, credit value and course end date.  | Student top tab > Transcript side tab   | TRAX reference guide<br>- To Manually Add an Historical Transcript Record to a Student |
| Sep/Oct                                      | Ensure students who are <b>not</b> writing exams have the appropriate TRAX override value assigned in the provincially examinable course transcript record.   | Student top tab > Transcript side tab   | TRAX reference guide<br>– TRAX Override  |
| Oct  | Prepare Grade Input   | Grades top tab > Grade Input side tab > Options > Prepare Grade Input > set Report Type to Course > Finish  | Grade Management reference guide   |
| Oct  | Post course dates for Semester 1 courses  | Grades top tab > Grade Input side tab > Options > Post Grades > Check Course dates box.   | Grade Management reference guide   |
| Oct<br>(just prior to running TRAX extracts) | Run the Course Exam Synchronize Procedure to:<br>Create exam requests for students with provincially examinable courses on their current schedule or in their Transcript side tab for the current year.<br>Remove exam requests from students who have had schedule changes in their current year timetable | Student top tab > Options > Course Exam Synchronize Procedure   | TRAX reference guide   |

| Timeline | Task  | Path   | Resource                              |
|----------|---|--|---------------------------------------|
| Oct      | Create graduation assessment records for students that will be writing the assessment in the Jan session. | Assessment top tab > Student Assessment > Assessment Entry side tab<br>Select Graduation Assessment definition   | Graduation Assessment reference guide |
| Oct      | Check for missing assessment session dates.<br>Manually populate session dates if necessary.              | Assessment top tab > Student Assessments side tab<br>Set the Assessment Definition field at the top of the screen<br>Set filter to Missing Test Session Dates. Does the Date 1 column have blanks? | TRAX reference guide                  |
| Oct      | Run the TRAX extracts   | Student top tab > Options > Exports<br>BC TRAX Extract – Course File<br>BCTRAX Extract – Demographics File<br>BC TRAX Extract – Exam File  | TRAX reference guide                  |

### Subsequent Submissions

Tasks are displayed in the order normally associated with the TRAX process. See detail in this document for additional information, if required.

| Timeline    | Task  | Path  | Resource           |
|-------------|---|---|--------------------|
| Feb/Apr/Jul | Schedule students into courses – ensure all students are scheduled into their courses, including provincially examinable courses.   | Student top tab > Schedule side tab   | Student Scheduling |
| Feb/Apr/Jul | Remove current year “orphaned” transcript records for your own school, if applicable.<br>This will happen when a student changes schools and the transcript record for a course has been created, but does not have an equivalent scheduled course in the student schedule. | Grades top tab > Transcripts side tab > set dictionary icon to All > set filter to No Student Schedule Equivalent.<br>In the pop-up,<br>Set School Year field to the current school year<br>Set Search based on to Final Mark is Empty<br>Check the school name for your own records<br>Review the records and if appropriate, delete these “orphaned” records. |                    |
| Feb/Apr/Jul | Ensure manually entered transcript records have an appropriate course end date and credit value.  | Student top tab > Transcript side tab   |                    |

| <b>Timeline</b> | <b>Task</b>   | <b>Path</b>  | <b>Resource</b>                       |
|-----------------|---|--|---------------------------------------|
| Feb/Apr/Jul     | Ensure students who are not writing exams have the appropriate TRAX override value assigned in the provincially examinable course transcript record.  | Student top tab > Transcripts side tab   | TRAX reference guide                  |
| April           | Post course dates for Semester 2 courses  | Grades top tab > Grade Input side tab > Options > Post Grades > Check Course dates box.  | TRAX reference guide                  |
| Feb/Apr/Jul     | Run the Course Exam Synchronize Procedure to:<br>Create exam requests for students with provincially examinable courses on their current schedule or in their Transcript side tab for the current year.<br>Remove exam requests from students who have had schedule changes in their current year timetable | Student top tab > Options > Course Exam Synchronize Procedure  | TRAX reference guide                  |
| Feb             | Create graduation assessment records for students that will be writing the assessment in the June session.  | Assessment top tab > Student Assessment > Assessment Entry side tab<br>Select Graduation Assessment definition   | Graduation Assessment reference guide |
| Feb/Apr/Jul     | Create graduation assessment records for students that will be writing the assessment in the June session.  | Assessment top tab > Student Assessment > Assessment Entry side tab<br>Select Graduation Assessment definition   | Graduation Assessment reference guide |
| Feb/Apr/Jul     | Review exam and blended marks or graduation assessment results uploaded from previous sessions. Manually update missing values as necessary.  | Assessment top tab > Student Assessments side tab<br>Select appropriate Assessment definition field at the top of the screen Sort or query for blank values. | TRAX reference guide                  |
| Feb/Apr/Jul     | Run the Blended Marks to Transcript procedure to populate transcript records with the manually entered exam and blended marks.  | Student top tab > Options menu   | TRAX reference guide                  |
| Feb/Apr/Jul     | Run the Calculate Credits procedure to update the student credits for provincially examinable courses.  | Grades top > Transcripts side tab > Options > Calculate Credits  | TRAX reference guide                  |



| Timeline    | Task                  | Path  | Resource             |
|-------------|-----------------------|---|----------------------|
| Feb/Apr/Jul | Run the TRAX extracts | Student top tab > Options > Exports<br>BC TRAX Extract – Course File<br>BCTRAX Extract – Demographics File<br>BC TRAX Extract – Exam File | TRAX reference guide |



#### 15.3.1.4 TRAX Processes – Detail

Deleting “Orphaned” Transcript Records As students move between schools before completing courses, transcript records may be created as term grades or course dates are posted for the student’s courses. If the student changes schools before completing the course, an empty, (orphaned) transcript record occurs on the student’s course history.

#### Deleting “Orphaned” Transcript Records

As students move between schools before completing courses, transcript records may be created as term grades or course dates are posted for the student’s courses. If the student changes schools before completing the course, an empty, (orphaned) transcript record occurs on the student’s course history.

#### To remove these records:




1. In the School view, click the Grades top tab.
2. Click the Transcripts side tab. Set the  icon to All.
3. Set the  to No Student Schedule Equivalent.
4. In the pop-up window, set the School year field to the current year and set the Search based on field to Final Mark is Empty.
5. Review the records and determine if it is appropriate to delete them. If they were created at this school and will not be continued or given a final mark at this school, it may be appropriate to delete the record. Only delete records from this school, contact other schools before deleting their records.
6. Select the records for deletion by checking the box beside them.
7. In the Options menu, select Delete.

#### Manually Add an Historical Transcript Record to a Student

Historical transcript records may need to be manually added for students who enroll in the school from out of province/country, or for students who come from a school that has not been using **MyEducation BC**.

Adding historical course records for a student will require that the converted historical course catalogues have transcript definitions applied to the courses.

### To add an historical transcript record to a student:

1. In the School view, select the Student top tab.
2. Click on the Transcript side tab.
3. In the Options menu, select Add. A blank transcript screen will appear
4. Click on the  in the **Year ID** field. Select the year in which the student completed this course.
5. Click on the  in the **School > Name** field and select the school of record for the course.
6. Click on the  in the **Number** field and select the course from the pick list.
7. Populate the **Final Mark, Blended mark and Provincial Exam Mark** fields as appropriate.
8. Populate the **Credit** field with the appropriate credit value.
9. Set the **FAS Override** flag, if necessary. This is optional and need only be set as necessary for the diploma program the student is associated with.

|                |                                      |                      |                            |
|----------------|--------------------------------------|----------------------|----------------------------|
| Year ID *      | 2016-2017                            | Final Mark           | 92                         |
| School > Name  | Smithers Secondary                   | Blended Mark         | 0.0                        |
| Grade level    | 12 <input type="checkbox"/> Override | Provincial Exam Mark | 0.0                        |
| Number *       | MEN-12                               | Credit               | 0.0                        |
| Description    | ENGLISH 12                           | TRAX Override        | Equivalent Not Writing (Q) |
| Teacher        |                                      | FAS Override         |                            |
| Teacher        | Shi, Mehta                           | Hide on report card  | A<br>B<br>F                |
| Section number | 03                                   | Hide on transcript   |                            |

10. Populate the Completion Date field as appropriate for the year of the course. Start Date and End Date may also be entered at this time.

|                 |            |
|-----------------|------------|
| Completion Date | 27/01/2017 |
|-----------------|------------|

11. If the course is provincially examinable:


- a. If the student is not writing the exam, use the TRAX Override field to select the appropriate reason. Click Save. No assessment record is required for the course. This will force the course into the CRS file for the TRAX extract

|               |                            |
|---------------|----------------------------|
| TRAX Override | Equivalent Not Writing (Q) |
|---------------|----------------------------|

- b. If the student has written the exam:

- i. Leave the **TRAX Override** field blank and ensure there is a **Course End Date** then click **Save**.

- ii. In the **Transcript** side tab > **Options** menu, run the **Course Exam Synchronize Procedure** to create an associated assessment record.

iii. Go to the **Assessments** side tab and click the  to choose Provincial Exam from the list of assessments. Manually enter the exam and blended mark into the assessment record for the course and save the record.

#### *15.3.1.5 Course Exam Synchronize Procedure*

The Course Exam Synchronize Procedure creates assessment records for government examinable courses that are correctly linked to the course and transcript record. Assessment records are required for government exam courses to transmit correctly to TRAX and graduation reports.

If a transcript record does not exist for the course (when run from the Student top tab): The Course Exam Synchronize Procedure uses the course schedule end date and assigns a session date to the assessment record.

If a transcript record exists for the course: The Course Exam Synchronize Procedure looks to the course end date in the transcript record and assigns a session date to the assessment record. Prior to running the procedure it is important to post course dates to the transcript record. (see Posting Course Dates section) A blank course end date in the transcript record will result in a blank session date in the assessment record.

Additionally, where there is an assessment record but no corresponding Transcript record or course schedule record, the Provincial Exam assessment record will be deleted as a cleanup operation of this procedure, where that exam record has no value(s) populated for the Exam Mark and/or Blended Mark.

##### *15.3.1.5.1 To Create Provincial exam Records for All students:*

1. In the School view, select the Student top tab.
2. In the Options menu, select Course Exam Synchronize Procedure.
3. In the pop-up window, select Run. This will create assessment records for all students who have a current-year, provincially examinable course on their schedule, or in their transcript side tab.

##### *15.3.1.5.2 To Create Provincial exam Records for an Individual Student:*

**Scenario 1:** A student may arrive at the school after the course exam synchronize procedure has been run for the school. Yet they will have examinable courses scheduled on their timetable, so the procedure can be run for an individual student.

1. In the School view, select the Student top tab.
2. Click the Workspace side tab and schedule the student as necessary.
3. In the Options menu, select Course Exam Synchronize Procedure.
4. Click Run. Necessary assessment records will be created for the student.

The exam session date will populate based on the end date of the course (see table below). If the student chooses to not write the exam until a later test session, then a later date can be entered on the Student Assessment test date field when that date is known. The date format is YYYYMM.



| Course Completion date | Default Session Month   |
|------------------------|---|
| January                | January   |
| February               | January   |
| March                  | April if exam is offered, or next available session for that exam (May or June) |
| April                  | April if exam is offered, or next available session for that exam (May or June) |
| May                    | May if exam is offered, otherwise June  |
| June                   | June  |
| July                   | June  |
| August                 | August if exam is offered, or next available session for that exam (Nov or Jan) |
| September              | November if exam is offered, otherwise January in the next year                 |
| October                | November if exam is offered, otherwise January in the next year                 |
| November               | November if exam is offered, otherwise January in the next year                 |
| December               | January in the next year  |

Examinable courses without a blended mark or a Q code will not be assigned credit for the course for graduation.

#### 15.4 Manually Creating Assessment Records for Provincial Exams

As it is critical that there is a valid link between the course transcript record and the assessment record, it would be a very rare occasion that an assessment record would be manually created. One of these scenarios could be for a student who has completed a course in a previous year, but is writing the exam in the current year and no exam record exists for the previous year's course. In this scenario, an exam may have been requested from the Ministry of Education manually and the assessment record in **MyEducation BC** could be entered manually. It is important to note that if this is done, the Ministry upload of exam marks will not populate the record and any exam and blended mark would need to be manually populated in the assessment record and the student course transcript record when the exam has been written.



To remove these records:

1. In the School view, click the Grades top tab.
2. Click the Transcripts side tab. Set the  icon to All.
3. Set the to  No Student Schedule Equivalent.
4. In the pop-up window, set the School year field to the current year and set the Search based on field to Final Mark is Empty.
5. Review the records and determine if it is appropriate to delete them. If they were created at this school and will not be continued or given a final mark at this school, it may be appropriate to delete the record. Only delete records from this school, contact other schools before deleting their records.


6. Select the records for deletion by checking the box beside them.
7. In the Options menu, select Delete.


#### Manually Add an Historical Transcript Record to a Student

##### 15.4.1 To manually create an assessment record for a provincial exam:

1. In the School view, select the Student top tab.
2. Check the box beside the student requiring an assessment record.
3. Click the Assessments side tab.
4. In the Assessment Definition field at the top of the screen, use the  to select Provincial Exam from the list. This will present the correct field set for the record.
5. In the Options menu, select Add.
6. Populate the Date field with the date the record is being added. .
7. Populate the Grade field with the grade the student is in when writing the exam.
8. Populate the Exam Code with the Ministry course code for that exam.
9. Populate the Course End Date with the date the student completed the course. .
10. Populate the Exam Session Date 1 with the session date the student will be writing the exam (format is YYYYMM).
11. Use the  to select the school name where the exam will be written.
12. Click Save.
13. When the exam has been written and results have been posted to the Ministry web site:
  - a. Return to this record and populate the Exam Mark 1 and Blended Mark 1 with the appropriate values.
  - b. Go to the student's **Transcript** side tab, click into the details of the associated course and populate the **Blended Mark** and **Provincial Exam Mark** fields to match the assessment record. Click **Save**.

##### 15.5 Identify Missing Session Dates on Assessment Records for provincial exams


1. In the **School** view, select the **Assessments** top tab.
2. Click the **Student Assessments** side tab.
3. In the **Assessment Definition** field at the top of the screen, use the  to select **Provincial Exam** from the list. This will present the correct field set for the records.

4. Set the  to **Missing Test Session Dates**. If records appear, the **Date1** field will be empty. Click into the detail of the record and populate these fields with the appropriate session date based on the **Course End Date** field.

### 15.6 Manually Update Blended / Exam Marks

In the event that exam results have not populated for a student when the Ministry upload of exam marks has been completed, the marks can be manually entered into MyEducation BC.

Note: Prior to changing marks in a Government Examinable course ensure you have reviewed the Handbook of Procedures policies on changing Examinable course marks.

1. In the **School** view, select the **Student** top tab.
2. Check the box beside the student requiring the entry.
3. Click the **Assessments** side tab.
4. In the **Assessment Definition** field at the top of the screen, use the  to select **Provincial Exam** from the list. This will present the correct field set for the assessment records.
5. Click the blue hyperlink of the student record with the exam code to be updated.
6. Populate the **Exam Mark 1** and **Blended Mark 1** fields with the appropriate values.
7. If the assessment record was created through the course exam synchronization procedure, go to the Options menu and select Blended Marks to Transcript.
  - a. Leave the **Days to include (blank for all)** field blank.
  - b. Click Run. This will populate the **Blended Mark** and **Provincial Exam Mark** fields on the corresponding student's course transcript record.
8. If the assessment record was created manually, update the **Exam Mark 1** and **Blended Mark 1** with the appropriate values. Then go to the student's Transcript side tab, click into the details of the associated course and populate the **Blended Mark** and **Provincial Exam Mark** fields to match the assessment record. Click **Save**.

#### 15.6.1 TRAX Override

Adult students or students who have been granted equivalency can choose to not write the associated exam. Alternatively, an Adult student or student who has been granted equivalency may choose to write the exam. The TRAX Override field should be set as appropriate to address these scenarios. This ensures that the record is put into the appropriate CRS or XAM extract for the student.

1. In the School view, select the Student top tab.
2. Click the Transcript side tab.
3. Create or select the course requiring a TRAX override setting.
4. Select the appropriate TRAX Override value.

### 15.7 Enter a Related Course Code for Independent Directed Studies

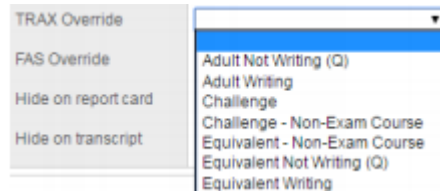
The related course code for MIDS courses can be added directly to the student transcript once a transcript record has been created.

1. In the School view, select the Student top tab.
2. Click the Transcript side tab.
3. Create or select the MIDS course requiring a related course code.
4. Check the User Description checkbox and the IDS Related Course field becomes editable.
5. Select the related grade 10-12 Ministry or BAA course code from the Picklist.
6. Save the record.

### 15.8 TRAX Override

Adult students or students who have been granted equivalency can choose to not write the associated exam. Alternatively, an Adult student or student who has been granted equivalency may choose to write the exam. The **TRAX Override** field should be set as appropriate to address these scenarios. This ensures that the record is put into the appropriate CRS or XAM extract for the student.

7. In the **School** view, select the **Student** top tab.
8. Click the **Transcript** side tab.
9. Create or select the course requiring a TRAX override setting.



10. Select the appropriate **TRAX Override** value.

11. The table below indicates the expected behaviour regarding the provincial exam assessment record and TRAX codes submitted:

| Type                         | Create Exam | TRAX Code | Q Code |
|------------------------------|-------------|-----------|--------|
| Adult Writing                | Y           |           |        |
| Adult Not Writing (Q)        | N           |           | Y      |
| Equivalent Writing           | Y           | E         |        |
| Equivalent Not Writing (Q)   | N           | E         | Y      |
| Equivalent - Non-Exam Course | N           | E         |        |
| Challenge                    | Y           | C         |        |
| Challenge - Non-Exam Course  | N           | C         |        |
| Blank                        |             |           |        |

### 15.9 Aegrotat Standing for Provincial Exams

Aegrotat Standing is an exemption from writing a provincial exam or graduation assessment that is granted by the Ministry of Education. Application must be made to the Ministry of Education per the Handbook of Procedure.

Submit these student course records, as you do any other student, through the .xam file (meaning the assessment record must be created).

If the student was approved for Aegrotat Standing by the Ministry of Education, the Ministry upload of exam marks will return AEG as the exam mark and the school final mark as the blended mark for provincial exams. A result of AEG will be returned for a graduation assessment.

Occasionally, schools may need to update the assessment record manually. For example, if the Ministry approval does not come back in time for the exam marks to be included in the Ministry exam mark upload. Entering AEG into the transcript record exam mark field will indicate the course was granted AEG status.

When correctly entered, the DVR and School Transcript report both display AEG as the assessment mark.

### 15.10 Fine Arts and Applied Skills

As indicated in the Handbook of Procedures for the Graduation Program, students have several options for satisfying the Fine Arts and/or Applied Skills graduation requirement that schools must report to the Ministry.

Some fine arts and applied skills courses may be designated as 2.0 or 4.0 credit courses at the District level. If schools require both a 2.0 and 4.0 credit version of the course to schedule students into, a flavour of each will need to be created at the district level to be brought into the school. Refer to the School Setup document for these instructions.

If an individual student transcript records requires a specific Fine Arts or Applied Skills designation on a course and a specific credit value, this can be achieved by setting the FAS Override flag and adjusting the credit value directly on the student transcript record.

### 15.11 Posting Course Dates

Posting Course Dates creates a start and end date in the transcript record for the course, and allows a completion date to populate when the final mark is posted. In standard schools this process should be done after the bulk of September student course changes and just prior to the first TRAX submission in October. Posting Course Dates is a part of the Prepare Grade Input process but it is not required for teacher gradebook functions in regular school. Detailed instructions on the complete Prepare Grade Input and Posting Course Dates process can be found in the Grade Management document.

Course dates should only be posted for current courses. For example, in October, it is best NOT to post dates for second semester courses. If dates are posted for second semester courses, students who drop a course will have a student transcript record already created for that class which may need to be deleted.

1. **School** view > **Grades** top tab and click the **Grade Input** side tab

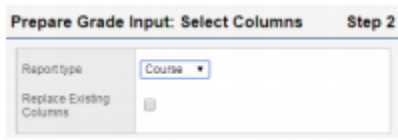


2. Here you may narrow the scope if you wish and select the courses you would like to create transcript records for then go to **Options** and **Show Selected**. A filter entitled **“Schedule Term = ?”** has been created to help users to only post date columns for current courses.

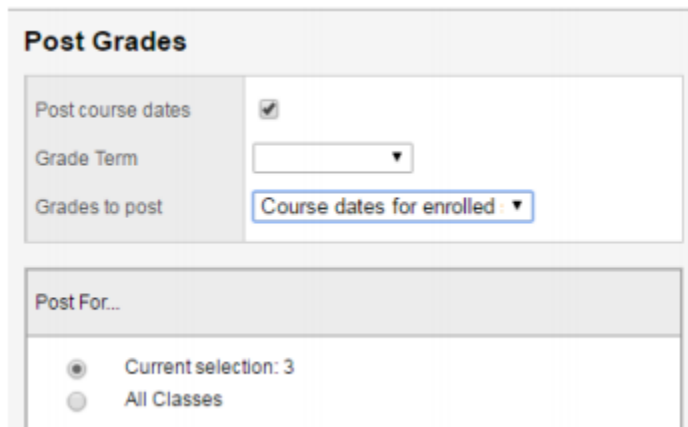
3. Go to **Options** and choose **Prepare Grade Input**

4. In the pop up choose **current selection** and click next

5. In this screen select **Course** for the Report Type and click **finish**



6. On the Grades top tab > Grade Input side tab, select the Options menu > Post Grades. A pop up window for Posting Grades will display. Check the Post course dates box and click OK



### 15.12 Viewing Exam Results

After exam session dates have passed and exam and blended marks have been uploaded at MyEducation BC, the results can be viewed in the following locations:

- **School view > Student top tab > Assessments side tab > Details > Or**
- **School view > Assessments top tab > Student Assessments side tab > Assessment History sub-side tab > Details leaf >.**


***Remember to set the Assessment Definition field at the top of the screen when viewing assessment records in either location.***

### 15.13 Blended Marks to Transcript Procedure

This procedure is run automatically for all districts when exam and blended marks are loaded from the Ministry. Schools may need to run it if they have manually modified exam and/or blended marks on the Assessments screens.

To run the **Blended Marks to Transcripts Procedure** for an Individual Student:

1. In the **School** view, select the **Student** top tab.

2. Click the **Transcript** side tab. Set the  icon to All to view transcript records.
3. In the **Options** menu, select **Blended Marks to Transcript**.
4. Leave the **Days to include (blank for all)** field set to blank.
5. Click **Run**.
6. Review the transcript records to ensure the marks populated the **Prov Exam** and **Blended** fields on the examinable course records.


To run the Blended Marks to Transcripts Procedure for all students:

1. In the **School** view, select the **Student** top tab.
2. In the **Options** menu, select **Blended Marks to Transcript**.
3. Leave the **Days to include (blank for all)** field set to blank.
4. Click **Run**.
5. Review the transcript records for a few students to ensure the marks populated the **Prov Exam** and **Blended** fields on the examinable course records.

#### 15.14 Calculate Credits Procedure

Credits can be adjusted using the Calculate Credits procedure in the Grades top tab. When this procedure is run, credits will be adjusted for all courses with posted final marks (nonexaminable) and those with Blended marks (examinable). This procedure can be run at any time but is also typically done after exam/blended marks are loaded from the Ministry of Education. This should be run after the Blended Marks to Transcript procedure has populated the student transcript records with the provincial exam and blended marks.

**To run the Calculate Credits procedure:**

1. In the **School view**, select the **Grades** top tab.
2. Click the **Transcripts** side tab.
3. Set the  icon to **All**.
4. In the **Options** menu, select **Calculate Credits**.
5. Confirm the **Calculate For** window indicates an appropriate number of records in **Current Selection**.
6. Click **OK**

#### 15.15 Running the TRAX Extracts

The TRAX extracts are run as three separate files in MyEducation BC. Users need to have their computer configured to show file extensions so the files can be identified after download.

**For Windows:**

Control Panel > Folder Options > View top tab > **uncheck** Hide extensions for known file types

**For MAC**

Finder > Preferences > Advanced

Check the box that says "show all filename extensions".

**To run the TRAX extracts:**

1. In the School view, select the Student top tab.
2. In the Options menu, select Exports. From the fly-out menu, select BC TRAX Extract – Course File.
3. Confirm the school name is correct. Click Run. Close the window.
4. In the Options menu, select Exports. From the fly-out menu, select BC TRAX Extract – Demographic File. Click Run. Close the window.
5. In the Options menu, select Exports. From the fly-out menu, select BC TRAX Extract – Exam File. Click Run. Close the window.
6. In the Reports menu, select My Job Queue. When the job is complete, click the blue hyperlink Finished (click to view).
7. Save the file as schoolnumber.DEM, CRS, or XAM, as appropriate. (Ex. 02323044.XAM)

### 15.16 TRAX Logic

The following information outlines the basic standard MyEducation BC TRAX Logic.

1. When a Provincially examinable course is added to a Student's Course Selections or manually added to a student's transcript, a Provincial Exam Record is not immediately created. A procedure called the Course Exam Synchronize Procedure must be run. This Procedure looks at the end date in Student Transcript Records first and then the scheduled course end date. For DL and CE schools it will look to the Course Completion date first if there is one. If there is no Course Completion Date it will look to the course end date. If there is no Transcript Record yet, the Course Exam Synchronize Procedure will look at the Course Schedule's end date to identify the test session date.
2. When a Provincially examinable course is dropped from a Student's Course Selections the corresponding Provincial Exam Record is not dropped automatically. Again, the Course Exam Synchronize Procedure must be run to update student assessment records.
3. Credits are only adjusted when the "Calculate Credits..." procedure is run through the School view > Grade top tab > Transcript side tab > Options menu. When this procedure is run, credits will be adjusted for all courses with posted final marks (nonexaminable) and those with Blended marks (examinable).

TRAX Extracts can be created from the Options menu > Exports of the Student top tab of MyEducation BC:

1. DEM File – This file contains demographic information.
2. XAM File – This file contains information on provincially examinable courses and graduation assessments.

If there is NO blended mark and NO exam mark on the Student Assessment Record:


- The School Mark will be extracted and populated in this file, and
- The Ministry will use the highest School Mark it has on record to create a blended mark.

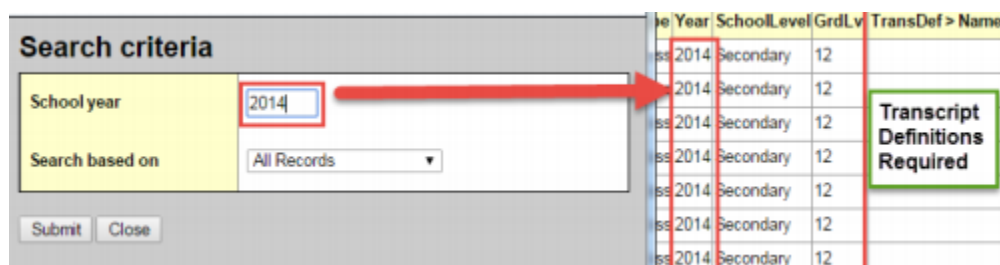
If there is NO results on the Student Assessment record for the Graduation assessment record:

- the Numeracy assessment code and session date will be extracted
4. CRS File – This file contains information on non-examinable courses. Each time a TRAX extract is run the School Mark is extracted and repopulates the value at the Ministry. The Ministry does not retain information on non-examinable courses; they rely on each TRAX extract to re-populate these values. This extract includes initial registration, interim and final letter grades, and interim and final letter grades.

### 15.17 Adding Transcript Definitions to Historical Course Catalogues

Transcript definitions must be added to historical course catalogues in order for the course list to appear for the appropriate year when manually entering historical course records to a student's transcript side tab.

1. In the **School** view, select the **Schedule** top tab.
2. Click the **Courses** side tab.
3. Use the  icon to select the **Year = ?** filter. In the pop-up window:
  - a. Set the **School year** field to the year of the school course catalogue that needs transcript definitions. For example, to search for the 2014-2015 course catalogue, enter 2015, for the 2013-2014 course catalogue, enter 2014, etc.
  - b. Set the **Search based on** field to **All Records**.
  - c. Click **Submit**. The course list will now display all courses in the course catalogue for the year selected.



| Year | School Level | GrdLv | TransDef > Name |
|------|--------------|-------|-----------------|
| 2014 | Secondary    | 12    |                 |
| 2014 | Secondary    | 12    |                 |
| 2014 | Secondary    | 12    |                 |
| 2014 | Secondary    | 12    |                 |
| 2014 | Secondary    | 12    |                 |
| 2014 | Secondary    | 12    |                 |
| 2014 | Secondary    | 12    |                 |

5. If the **TransDef > Name** field is blank, assign transcript definitions to the courses. This can be done using the mass update or modify list functions

### 12.18 Ministry of Education Resources

The Ministry of Education website at <http://www.bced.gov.bc.ca/exams/> has several resources related to exam write dates, requirements and graduation requirements. Of particular note is the **Handbook of Procedures**, which outlines all of the requirements for student graduation. This resource should be referred to and understood by all users who are responsible for TRAX and who are tasked with ensuring students meet graduation requirements.

#### Popular Topics

- ✦ [June 2017 Provincial Exam Bulletin \(PDF 43KB\)](#)
- ✦ [Exam Schedule](#)
- ✦ [Exam Specifications](#)
- ✦ [Grade 12 e-Exams](#)
- ✦ [Handbook of Procedures](#)
- ✦ Oral Component of French Language Exams Administration Dates
  - ✦ [FRAL language exams](#)
  - ✦ [FRALP language exams](#)
- ✦ [Calculator Policy](#)
- ✦ [Grade 12 Marking Information and Application](#)

### 12.19 Provincial Grad Assessments

The 2018 Graduation program requires students to successfully complete a Numeracy and a Literacy assessment. The graduation assessments are not tied to a specific course or grade level nor do they earn “credits” towards graduation.

#### 12.19.1 Assessment Definitions

There are five provincial Graduation assessment definitions. For the 2017-18 school year, only the Numeracy assessments will be available. The Literacy assessments are expected to be available for the 2018-19 school year.

| Description                                 | External Code |
|---|---------------|
| Graduation Numeracy – English               | NME           |
| Graduation Numeracy – French                | NMF           |
| Graduation Literacy – English               | LTE           |
| Graduation Literacy – French                | LTF           |
| Graduation Literacy – Programme Francophone | LTP           |

**Important Note:** Each assessment definition has a unique field set for Assessment History, Assessment Entry and Student Assessment. Manage your field sets and select the appropriate field set to match the assessment definition when viewing data on any of these screens. You must select an Assessment definition to see the field set, e.g. Default Fields (NME) is available for Numeracy English; Default Fields (NMF) is available for Numeracy French.

## 12.20 Graduation Assessment Entry

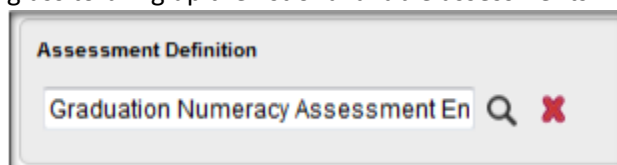
### 12.20.1 Enrol a Student to Write an Assessment

The enrollment of a student to write an assessment can be done in the district or school view, for an individual student or for a selection of students.

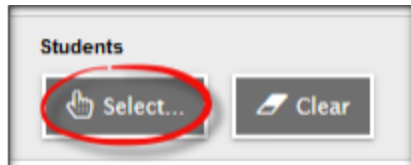
Only the primary school can create assessment records for students. The Assessment Entry screen is used to add assessment records. The Assessment History screen is where all updates and reviews of student assessments should occur.

Assessment TT > Student Assessment ST > Assessment Entry

1. Select the Assessment Definition to be assigned to the student(s). Click on the magnifying glass to bring up the list of available assessments.



2. Select the students to enrol. Options available for selection are: Grade Level, Group, Query, Snapshot or Selection. For each student in the selection, any existing assessment records for this assessment definition appear. Otherwise, a blank assessment record is presented for data entry. Use the Clear button to clear the selection. This does not delete the assessment records – just clears the selection.



3. Enter the session date that the student plans to write the assessment. Use CTRL D to copy the date down for all students on the list. Copying down will overwrite an existing date for the assessment.

| AssessmentDef > ID * | AssessmentDef > Name *                 | Date *     |
|----------------------|--|------------|
| NME                  | Graduation Numeracy Assessment English | 22/01/2018 |

4. The school name will automatically populate with the students primary school when the date is entered. The school name can be changed to reflect where the student will be writing the assessment, if it is within your district.

**Note:** To move quickly across rows and down columns, press TAB or use your arrow keys. You can also click directly in a cell. To enter the same value for all students, enter a value for the first student, then press CTRL + D, or click Options > Fill-Down Values. Copy down (CTRL D) is restricted by the number of records per page.

**CTRL D / Fill-down will overwrite existing records!**

### 12.20.2 Rewrites

To add an additional assessment record go to Assessment TT > Student Assessment ST > Assessment Entry

1. Select the Assessment Definition to be assigned to the student(s).
2. Select the Student(s) to be updated. You may select an individual student or a group of students using the Select button.
3. Click on the + sign beside the student PEN field.

| Name                        | Grade | Pupil # | PEN       | AssessmentDef > ID * | AssessmentDef > Name *                 | Date *     | Result                        | School > Name     |
|-----------------------------|-------|---------|-----------|----------------------|--|------------|-------------------------------|-------------------|
| Albenmossop, Kaidenz        | 10    | 527353  | 126409010 | NME                  | Graduation Numeracy Assessment English | 22/01/2018 | 2 - Developing                | Belmont Secondary |
| Alexanderbonneau, Mariechen | 10    | 529742  | 126016427 | NME                  | Graduation Numeracy Assessment English | 22/01/2018 | 3 - Proficient                | Belmont Secondary |
| Allardweinberg, Yuning      | 10    | 483069  | 126234574 | NME                  | Graduation Numeracy Assessment English | 22/01/2018 | 4 - Extending                 | Belmont Secondary |
| Alkam, Aubrina              | 10    | 519320  | 126689931 | NME                  | Graduation Numeracy Assessment English | 22/01/2018 | 1 - Emerging                  | Belmont Secondary |
| Almandawi, Changhui         |       |         |           | NME                  | Graduation Numeracy Assessment English | 22/01/2018 | NC - Student did not complete | Belmont Secondary |
|                             |       |         |           | NME                  | Graduation Numeracy Assessment English | 21/06/2018 |                               | Belmont Secondary |

4. A new row will display. Enter the date for the new assessment.

|     |  |            |                               |
|-----|--|------------|-------------------------------|
| NME | Graduation Numeracy Assessment English | 22/01/2018 | NC - Student did not complete |
| NME | Graduation Numeracy Assessment English | 21/06/2018 |                               |

## 12.21 Review and Update Assessment Records

Student assessment records can be reviewed and updated in the district or school view, for an individual student or for a group of students.

Assessment TT > Student Assessment ST > Assessment History for all students

Student TT > Assessments ST > for a specific student

### 12.21.1 Assessment History

Review all records for a specified assessment definition at Assessment TT > Student Assessment ST > Assessment.

1. Select the Assessment definition. All primary students with an assessment record for the assessment definition will be displayed.
2. Manage your field sets and select “Default Fields (NME)” to see all applicable fields of data for the Numeracy definition.
3. Use your filters to select students to view

| Student Name    | Student - Grade | Student - Page # | Student - PER | Student - Alerts | AssessmentID - ID | AssessmentDef - Name                   | Date     | Result     | Special | School - Name     |
|-----------------|-----------------|------------------|---------------|------------------|-------------------|--|----------|------------|---------|-------------------|
| Abdennur, Ahsan | 11              | 128146           | 12907138      |                  | NMC               | Graduation Numeracy Assessment English | 20140918 |            |         | Belmont Secondary |
| Ahmed, Ahsan    | 11              | 127084           | 124015147     |                  | NMC               | Graduation Numeracy Assessment English | 12100011 | Extending  |         | Belmont Secondary |
| Ahmed, Ahsan    | 11              | 127084           | 124015147     |                  | NMC               | Graduation Numeracy Assessment English | 20140918 | Emerging   |         | Belmont Secondary |
| Ahmed, Ahsan    | 11              | 12714813         | 141015200     |                  | NMC               | Graduation Numeracy Assessment English | 20140918 |            |         | Belmont Secondary |
| Abdennur, Ahsan | 11              | 127183           | 12940919      |                  | NMC               | Graduation Numeracy Assessment English | 20140918 | Developing |         | Belmont Secondary |

### 12.21.2 Delete an Assessment History record

Occasionally, it may be necessary to delete an historical assessment record. Records that contain a mark should not be deleted, as the record is an important piece of evidence of a student’s progress towards graduation.

1. Click in the checkbox beside the Student name.
2. Options > Delete.

**Note:** If an assessment record already has a mark in the Results or Special Case field  
**DO NOT UPDATE OR DELETE the record!**

## 12.22 Individual Student Assessment Records

A primary or secondary student’s assessment records may be viewed by going to Student TT > Assessment ST.

1. Select the Assessment definition. All of the student’s assessment records for the assessment definition will be displayed. If you don’t select an assessment definition, then ALL of the student’s assessment records will display, however you won’t be able to select the field set to display the Graduation Assessment fields.



2. Manage your field sets and select “Default Fields (NME)” to see all applicable fields of data for the Numeracy definition.

#### 12.22.1 Add an Assessment record for an individual student

1. Assessment records can be added for Primary students only. You must select an assessment definition before you can choose to Add a record.

2. Options > Add.

3. Select the “Graduation Assessment” template for the appropriate fields.

4. Enter the date.

5. Save the record and the School name will populate.

6. Enter the Provincial Assessment result if available.

The Special Case field is used to receive information that is returned by the TRAX system. Possible values would be A – Aegrotat Standing, Q – Disqualified, or X – Incomplete.

The screenshot shows the 'Assessment Entry' form in the MyEducation BC system. The breadcrumb trail is 'Assessment TT > Student Assessments > Assessment Entry'. The form is for student '11 - Abrera, Kerys' on '18/01/2018'. The 'Date' field is set to '18/01/2018'. The 'Assessment Definition Name' is 'Numeracy French'. The 'School Name' is 'Belmont Secondary'. The 'Prov Assessment Result' and 'Special Case' fields are currently blank. A 'Graduation Assessments' dropdown menu is highlighted in yellow. The form includes 'Save' and 'Cancel' buttons at the top and bottom.

#### 12.23 Using the Date Range filters on Assessment Entry

Assessment TT > Student Assessments > Assessment Entry

To filter the display of existing assessment records, enter dates in the Date Range fields at the top of the page. MyEducation BC will display the assessment records within the date range specified for the students selected. For all of the other students in the selection a blank record is presented. To see all of the assessment records for the assessment definition chosen, leave the date fields blank. The display is limited to the students selected.

For example: A user has selected students in Grade 10. All Grade 10 students now appear on the screen. Some of the grade 10 students have assessment records for Jan 2017 and some have assessment records for Jun 2017 and some do not have any assessment records. Entering a date range will filter the records with dates within that range, and present a blank record for all of the other students in the selection.

**Assessment Entry**

Assessment Definition: **Graduation Numeracy Assessment English** | Date Range: [Blank]

0 of 310 selected

| Name                    | Grade | Page#   | PER       | Assessment ID | Assessment Name                        | Date     | Result | School Name       |
|-------------------------|-------|---------|-----------|---------------|--|----------|--------|-------------------|
| Bushell, Raeanthony     | 10    | 218943  | 143717480 | NRE           | Graduation Numeracy Assessment English | 24012018 |        | Belmont Secondary |
| Bullock, Sean           | 10    | 218989  | 144072634 | NRE           | Graduation Numeracy Assessment English | 24012018 |        | Belmont Secondary |
| Calica, Merv            | 10    | 2178791 | 143898959 | NRE           | Graduation Numeracy Assessment English | 21062018 |        | Belmont Secondary |
| Camptelashet, Janyssa   | 10    | 529472  | 129199454 | NRE           | Graduation Numeracy Assessment English | 21062018 |        | Belmont Secondary |
| Camptelashet, Sallee    | 10    | 491334  | 129419938 | NRE           | Graduation Numeracy Assessment English | 24052018 |        | Belmont Secondary |
| Camptelashet, Nakea     | 10    | 1436423 | 128337971 | NRE           | Graduation Numeracy Assessment English | 21062018 |        | Belmont Secondary |
| Camptelashet, Jobobemah | 10    | 1967630 | 128944998 | NRE           | Graduation Numeracy Assessment English | 24012018 |        | Belmont Secondary |

Date range is blank - All records display, with dates

Assessment Definition: **Graduation Numeracy Assessment English** | Date Range: 18/06/2018 to 22/06/2018

0 of 310 selected

| Name                    | Grade | Page#   | PER       | Assessment ID | Assessment Name                        | Date     | Result | School Name       |
|-------------------------|-------|---------|-----------|---------------|--|----------|--------|-------------------|
| Bushell, Raeanthony     | 10    | 218943  | 143717480 | NRE           | Graduation Numeracy Assessment English |          |        | Belmont Secondary |
| Bullock, Sean           | 10    | 218989  | 144072634 | NRE           | Graduation Numeracy Assessment English |          |        | Belmont Secondary |
| Calica, Merv            | 10    | 2178791 | 143898959 | NRE           | Graduation Numeracy Assessment English | 21062018 |        | Belmont Secondary |
| Camptelashet, Janyssa   | 10    | 529472  | 129199454 | NRE           | Graduation Numeracy Assessment English | 21062018 |        | Belmont Secondary |
| Camptelashet, Sallee    | 10    | 491334  | 129419938 | NRE           | Graduation Numeracy Assessment English |          |        | Belmont Secondary |
| Camptelashet, Nakea     | 10    | 1436423 | 128337971 | NRE           | Graduation Numeracy Assessment English | 21062018 |        | Belmont Secondary |
| Camptelashet, Jobobemah | 10    | 1967630 | 128944998 | NRE           | Graduation Numeracy Assessment English |          |        | Belmont Secondary |
| Caillietonias, Leaver   | 10    | 527939  | 129794449 | NRE           | Graduation Numeracy Assessment English |          |        | Belmont Secondary |
| Callaghan, Katryn       | 10    | 471848  | 129237737 | NRE           | Graduation Numeracy Assessment English |          |        | Belmont Secondary |
| Castro, Mackenzie       | 10    | 528907  | 127081996 | NRE           | Graduation Numeracy Assessment English |          |        | Belmont Secondary |
| Chambers, Nicola        | 10    | 140718  | 129184211 | NRE           | Graduation Numeracy Assessment English |          |        | Belmont Secondary |

Date range is Jun 18, 2018 to Jun 22, 2018.

The same 310 records for the Grade 10 students are displayed. If the student does not have a record within the date range, a blank record is presented allowing for the entry of assessment dates. Any existing record outside of this date range are not affected and have been saved.

Assessment Definition: **Graduation Numeracy Assessment English** | Date Range: 18/06/2018 to 22/06/2018

0 of 310 selected

| Name                  | Grade | Page#   | PER       | Assessment ID | Assessment Name                        | Date       | Result | School Name       |
|-----------------------|-------|---------|-----------|---------------|--|------------|--------|-------------------|
| Bushell, Raeanthony   | 10    | 218943  | 143717480 | NRE           | Graduation Numeracy Assessment English | 25/06/2018 |        | Belmont Secondary |
| Bullock, Sean         | 10    | 218989  | 144072634 | NRE           | Graduation Numeracy Assessment English | 25/06/2018 |        | Belmont Secondary |
| Calica, Merv          | 10    | 2178791 | 143898959 | NRE           | Graduation Numeracy Assessment English | 21/06/2018 |        | Belmont Secondary |
| Camptelashet, Janyssa | 10    | 529472  | 129199454 | NRE           | Graduation Numeracy Assessment English | 21/06/2018 |        | Belmont Secondary |
| Camptelashet, Sallee  | 10    | 491334  | 129419938 | NRE           | Graduation Numeracy Assessment English | 21/06/2018 |        | Belmont Secondary |
| Camptelashet, Nakea   | 10    | 1436423 | 128337971 | NRE           | Graduation Numeracy Assessment English | 21/06/2018 |        | Belmont Secondary |

Dates are entered for the June session for the students. Entering an assessment date will create a new assessment record if the student already has a record with a different date.

Assessment Definition: **Graduation Numeracy Assessment English** | Date Range: [Blank]

1 of 310 selected

| Name                    | Grade | Page#   | PER       | Assessment ID | Assessment Name                        | Date       | Result | School Name       |
|-------------------------|-------|---------|-----------|---------------|--|------------|--------|-------------------|
| Bushell, Raeanthony     | 10    | 218943  | 143717480 | NRE           | Graduation Numeracy Assessment English | 24/02/2018 |        | Belmont Secondary |
| Bullock, Sean           | 10    | 218989  | 144072634 | NRE           | Graduation Numeracy Assessment English | 23/02/2018 |        | Belmont Secondary |
| Calica, Merv            | 10    | 2178791 | 143898959 | NRE           | Graduation Numeracy Assessment English | 24/02/2018 |        | Belmont Secondary |
| Camptelashet, Janyssa   | 10    | 529472  | 129199454 | NRE           | Graduation Numeracy Assessment English | 21/06/2018 |        | Belmont Secondary |
| Camptelashet, Sallee    | 10    | 491334  | 129419938 | NRE           | Graduation Numeracy Assessment English | 24/02/2018 |        | Belmont Secondary |
| Camptelashet, Nakea     | 10    | 1436423 | 128337971 | NRE           | Graduation Numeracy Assessment English | 21/06/2018 |        | Belmont Secondary |
| Camptelashet, Jobobemah | 10    | 1967630 | 128944998 | NRE           | Graduation Numeracy Assessment English | 24/02/2018 |        | Belmont Secondary |

Students now have two assessment records with different dates. The record count at the top of the list shows the increase in the number of records.

## 13.0 SADE

### 13.1 Overview

The Student Achievement Data Exchange (SADE) collects course level data for every student for all Distributed Learning schools, Summer schools, and all public schools offering Grades 8 through 12 (including Continuing Education and Alternate Education Centres), as required by the School and Student Data Collection Order.

#### 13.1.1 Key Points

- Data will be extracted and submitted four times per year, at pre-determined reporting periods. The data collection windows are generally open for 31 days four times per year, in October, January, April, and July.
- Districts will control their own submission and release timing as there is no province wide submission.
- A separate extract file must be submitted for each school.
- All students being taught courses at DL (Distributed Learning) and CE (Continuing Education) schools will appear in the extract, regardless of cross-enrolled status or grade as long as they have an Active Date and have not yet completed the course or the course was completed in the current window.
- DL schools will report marks for all students at their schools.
- Data must be corrected prior to submission to the Ministry's DX2 interface

#### 13.1.2 Terminology

**SADE:** Student Achievement Data Exchange

**DX2:** Data Exchange, Ministry data collection interface

**Submission window:** 31 days after the end of the reporting period.

**Current Reporting period:** the 3 month window being reported on.

**Previous Reporting period:** the 3 month window prior to the current reporting period.

## 13.2 Preparing for SADE

### 13.2.1 Standard Schools

- School setup is complete.
- Students are registered and have PEN numbers. (Enrollment and Demographics guide)
- Students have been scheduled into their courses. (Student Scheduling guide)

### 13.2.2 Distributed Learning and Continuing education Schools

- School setup is complete. (School Setup guide).
- Students are registered and have PEN numbers. (Enrollment and Demographics guide)
- Students have been scheduled into their courses. (Student Scheduling guide)
- Grade input has been prepared for Course Dates (Distributed Learning & Continuing Ed Schools Setup and Processes guide)
- Course dates have been posted. (Distributed Learning & Continuing Ed Schools Setup and Processes guide)

The following table identifies the fields that the SADE extract file is looking for and where they are found in MyEducation BC.

### 13.3 Creating a Student Achievement Data Exchange Extract

To run the SADE extract:

1. In the School view, select the Student top tab.
2. In the Options menu, select Export.
3. Choose Student Achievement Data Exchange (SADE) from the fly-out options.
4. Make the appropriate selections in the extract parameter form.
5. Click Run.

#### 13.3.1 The SADE Process

1. Run the two SADE reports to determine accuracy of data.

##### a. **Student top tab > Reports > Ministry Reporting > Student Achievement Data Export**

The SADE report is a more user friendly view of the extract. The report presents the same information that is included in the extract, as well as the pupil ID, the Student name, and the School course code.

##### b. **Student top tab > Reports > Ministry Reporting > Student Achievement Data Export**

**Exception** The Exceptions report will identify situations that could potentially cause the data load to the DX2 web application to fail. If even one error is encountered, DX2 will reject the entire file. There are two types of exceptions reported.





- i. Those identified with an **E** for Error will cause the file to be rejected by the DX2 web application.
- ii. Those identified with a **W** for Warning may require the data be corrected, but will not cause the file to be rejected by the DX2 web application.


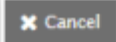
2. Make corrections and then run the SADE extract.

To run the **SADE extract**:

1. In the **School** view, select the **Student** top tab.
2. In the **Options** menu, select **Exports**.
3. Select **Student Achievement Data Exchange (SADE)** from the fly-out options.
  - a. **School(s)**: Select the school for the extract.
  - b. **Include** - Choose to run the extract for the Current reporting period or the Current & Previous. If you are running the extract before the “submission window” you will receive a warning and the file name will be appended with the word “Draft”.
  - c. **Current Session**: Dates are populated by the enterprise level.
  - d. **Previous Session**: Dates are populated by the enterprise level.
  - e. **Grades 8-12 (Non-DL)**: Non-DL schools select **Grade 8-12 (Non-DL)** checkbox to display valid students for SADE. DL and CE schools can ignore this option as all active students with active dates will display regardless if this box is checked or not.
  - f. **Sort order**: Choose a sort option. Click **Run**.

**Student Achievement Data Exchange (SADE)**

|                         |  |
|-------------------------|--|
| School(s)               | Smithers Secondary   |
| Include                 | Current   |
| <u>Current Session</u>  |  |
| Start date              | 2016-07-01   |
| End date                | 2016-09-30   |
| <u>Previous Session</u> |  |
| Start date              | 2016-04-01   |
| End date                | 2016-06-30   |
| Grades 8 -12 (Non-DL)   | <input checked="" type="checkbox"/>  |
| Sort order              | PEN   |

If exceptions are reported, errors will need to be corrected prior to submission to the DX2 interface. It may be necessary to edit the extract file to remove records if the corrections cannot be made in **MyEducation BC**.

If you attempt to run the extract at any time other than during the 31-day submission window, the file that is created will be appended with the word draft, to clearly define it as a file created outside the submission window.

### 13.3.2 Errors

If the same record appears multiple times in the same reporting period it will be considered a duplicate. Records are matched on School ID, PEN, Course code, Active Date and Section (class identifier). If duplicate records are reported, the user is responsible for removing the duplicate record from the extract file. DX2 will reject the file if duplicate records are encountered.

### Sample SADE Report

| PEN       | Pupil No | Student Name     | Course Code | School Course Code | Active Date | Class Identifier | Potential Credits | School Mark Type | School Mark Value | Equivalency / Challenge | Completion Date |
|-----------|----------|------------------|-------------|--------------------|-------------|------------------|-------------------|------------------|-------------------|-------------------------|-----------------|
| 006326620 | 793669   | Pilot, Drew      | ACHE-12     | ACHE-12            | 26-Aug-13   | J00000FY32       | 4                 |                  |                   |                         | 30-Jun-14       |
| 009172478 | 871954   | Hertz, Saara     | ACHE-12     | ACHE-12            | 26-Aug-13   | J00000FY32       | 4                 |                  |                   |                         | 17-Jun-14       |
| 028042210 | 727501   | Alberti, Suzanne | MAF--11     | MAF--11            | 03-Feb-14   | J00000FY21       | 4                 |                  |                   |                         |                 |
| 044635057 | 767584   | Fletcher, Elissa | MAC--11     | MAC--11            | 26-Aug-13   | J00000FY21       | 4                 |                  |                   |                         |                 |
| 080414480 | 795586   | Tobias, Rudi     | ACHE-12     | ACHE-12            | 26-Aug-13   | J00000FY32       | 4                 |                  |                   |                         |                 |
| 104442631 | 1260276  | Scales, Ryan     | ACHE-12     | ACHE-12            | 26-Aug-13   | J00000FY32       | 4                 |                  |                   |                         |                 |

### Sample SADE Exceptions Report

#### Exceptions

| PEN       | Pupil No | Student Name     | Course Code | School Course Code | Description                 | Active Date | Class Identifier | Completion Date | Message Type | Message   |
|-----------|----------|------------------|-------------|--------------------|-----------------------------|-------------|------------------|-----------------|--------------|---|
| 006326620 | 793669   | Pilot, Drew      | ACHE-12     | ACHE-12            | ADV. PLACEMENT CHEMISTRY 12 | 26-Aug-13   | J00000FY32       | 30-Jun-14       | E            | Invalid school mark type, must be either: 1, 2, 3 or 4                              |
| 006326620 | 793669   | Pilot, Drew      | ACHE-12     | ACHE-12            | ADV. PLACEMENT CHEMISTRY 12 | 26-Aug-13   | J00000FY32       | 30-Jun-14       | E            | Mark Type, Mark Value and Completion date must all be entered, or must all be blank |
| 009172478 | 871954   | Hertz, Saara     | ACHE-12     | ACHE-12            | ADV. PLACEMENT CHEMISTRY 12 | 26-Aug-13   | J00000FY32       | 17-Jun-14       | E            | Invalid school mark type, must be either: 1, 2, 3 or 4                              |
| 009172478 | 871954   | Hertz, Saara     | ACHE-12     | ACHE-12            | ADV. PLACEMENT CHEMISTRY 12 | 26-Aug-13   | J00000FY32       | 17-Jun-14       | E            | Mark Type, Mark Value and Completion date must all be entered, or must all be blank |
| 028042210 | 727501   | Alberti, Suzanne | MAF--11     | MAF--11            | VISUAL ART FOUNDATIONS 11   | 03-Feb-14   | J00000FY21       |                 | E            | Invalid school mark type, must be either: 1, 2, 3 or 4                              |
| 044635057 | 767584   | Fletcher, Elissa | MAC--11     | MAC--11            | ACCOUNTING 11               | 26-Aug-13   | J00000FY21       |                 | E            | Invalid school mark type, must be either: 1, 2, 3 or 4                              |

#### Duplicate Records

School Number, PEN, BCeSIS Course Code, Active Date and Class Identifier combination must be unique.

| PEN | Pupil No | Student Name | Course Code | School Course Code | Description | Active Date | Class Identifier | Potential Credits | Mark Value | Equivalency / Challenge | Completion Date |
|-----|----------|--------------|-------------|--------------------|-------------|-------------|------------------|-------------------|------------|-------------------------|-----------------|
|-----|----------|--------------|-------------|--------------------|-------------|-------------|------------------|-------------------|------------|-------------------------|-----------------|

#### Invalid Dates

| PEN       | Pupil No | Student Name     | Course Code | School Course Code | Description                          | Active Date | Message                      |
|-----------|----------|------------------|-------------|--------------------|--------------------------------------|-------------|------------------------------|
| 021060074 | 725748   | Alex, Louise     | MEN--10     | MEN--10            | ENGLISH 10                           |             | Active date must be included |
| 028042210 | 727501   | Alberti, Suzanne | MEN--12     | MEN--12            | ENGLISH 12 WORLD LITERATURE          |             | Active date must be included |
| 114737030 | 771850   | Story, Bala      | AELC-12     | AELC-12            | ADV. PLACEMENT ENGLISH LITERATURE 12 |             | Active date must be included |
| 434581916 | 792541   | Alex, Surjeet    | MSC--10     | MSC--10            | SCIENCE 10                           |             | Active date must be included |

### Summary

|                        | Number of Students | Total Number of Records |
|------------------------|--------------------|-------------------------|
| Error-based Exceptions | 32                 | 42                      |
| Warning-based          | 0                  | 0                       |
| Duplicates             | 0                  | 0                       |
| Invalid Dates          | 7                  | 11                      |

### 13.3.3 Ministry of Education Web Application

See the Ministry data collections website for instructions on how to load the file to the DX2 web application and interpret errors and warnings reported back after the file has been loaded.

This site also provides instruction on making manual adjustments to the extract and retaining the correct format for loading to the DX2 web application. Visit the website at

<http://www.bced.gov.bc.ca/datacollections/sade/> for the following instructions:

- User Instructions – Submissions / File Specifications / Questions and Answers / Tips and Tricks

### 14.0 EOYR & Next Year Activities

End of Year Rollover performs the following actions:

**Graduate seniors** runs first:

- Graduates Active and Active no Primary students with a YOG in the current year and the 'to be graduated' indicator a status of Graduate and a withdrawal code of "Graduated - Dogwood".

♣ These students will still have a grade of 12.

**End of Year Rollover** runs next:

- Students registered with a Pre-Reg status become Active.
- Moves students to their next school, creating a withdraw record for their current school and an entry record for the new school.
- Increases the YOG by +1 for students with the indicator 'RetainGrade' so they remain the same grade for the new school year.
- Withdraws students with the indicator Withdraw checked
- Assigns a new grade level based on YOG
- Ends or extends student secondary school associations (cross-enrollments), depending on the end date of the secondary school association.
- Ends Former school associations. Schools will no longer have access to students withdrawn from their schools in the previous year.
- Populates the student Homeroom with the Next Homeroom field if entered
- Deletes expired Journal and Conduct Incidents
- Update PSR Grade in the Student Membership Record for students Withdrawn, Enrolled or Retained (RetainGrade) by the EOYR process

### 14.1 Student Movement

#### 14.1.1 Returning Students

Students who do not have a next school value will be retained in the school, unless their Withdraw at EOY box has been checked. It is recommended that schools assign a next school value if they know

where the student is going to be in the new school year and if that school has contacted them and asked them to do so.

Assigning a next school value to these students facilitates the following:

- Makes the student available in the build view for next year scheduling.
- New school can see designated students that are coming to their school.
- Causes students to appear in the Next Year Students filter for determining enrollment numbers.

#### 14.1.2 Using the Pre-Transition Field Set

##### **Important Reminders:**

- Values in many columns of the Pre-Transition field set are static and carry forward year after year. The values must be validated for accuracy for the coming End of Year Rollover. Schools/Districts may choose to mass update or delete the information prior to starting the Pre-Transition process.

- Mass Update and Modify List functions can only be performed on Primary Active students. Set the filter to Primary Active Students if you intend to use these functions.

1. In the **School** view, select the **Student** top tab.

2. Click the  icon and select the Pre-Transition field set.

3. At this point, you have the ability to select individual students or query groups of students and use **Options > Mass Update** or **Options > Modify List**. If you are using mass update, ensure that you have the correct students selected for update. Current year values in this field set include: **Grade** and **GrSubLvl**, **EnrStatus**, **School>Name**, and **Homeroom**

a. **NextSkl > Name:** This field is populated for students transferring to another school for the next school year. Next School can also be populated for students who are staying in the school in order for them to appear in the next year student filters and the build view for scheduling.

- The EOYR process will create a withdraw record from the current school and an enrollment record to the new school.

- A new withdrawal and entry record will not be created for students with a next year value that are returning to their current school.

b. **Pre-transition Withdrawal Code:** Enter the Withdraw Code to be applied to the student if they are withdrawing or moving to a new Next School. If left blank, the Withdraw Code will default to: *To Next School* or *Graduated – Dogwood*.

c. **Academic Track:** This field is used with online student course requests for next year. Contact the person managing online course requests in your school to determine who should be updating the field.



d. **NextHomeroom**: This field can be used for organizing students into homerooms for next year. If this field is populated, the new homeroom will be assigned to the student as a part of the EOYR process.

e. **Next HR Teacher**: This information will populate automatically if a Next Homeroom value is assigned to a student. The corresponding value must be assigned to the teacher in staff details for the teacher name to appear.

f. **Diploma/SCCP Date**: This field can be populated for Grade 12 students who are graduating or students completion their Evergreen Certificate. This date is not used by EOYR, it prints on the PSR card Graduation Requirements Met field.

g. **RetainGrade\***: Checking this box indicates that the student is to be retained in the same grade and the EOYR process will add a year to the student YOG.

**Note**: This box does not mean the student will remain in your school – only that they will be retained in their current grade. The use of this checkbox would be rare in BC

h. **Withdraw\***: Checking this box indicates that the student is to be withdrawn and is not transferring to an active MyEducation BC school through the EOYR process. Checking this box is not used for students who have a Next School value or for students with a current year YOG and set 'to be graduated'. *Note: If the withdraw box is checked for a student with a next school value, the student will transfer to the next school and then be withdrawn.*

i. **To be Graduated\***: To be graduated indicates a student is to be withdrawn with an enrolment status of Graduate). Uncheck this box for all grade 12 students who are not graduating.

\* Only one of these settings may be used for a student at EOYR, and not all students will require one of these settings.

#### 14.1.2.1 Graduating Students

There are three requirements for a student to be part of the Graduating Seniors process at EOYR:

1. Current year YOG
2. Status of Active or Active no Primary
3. "To be graduated" indicator checked

All students with a YOG in the current year, with an Active or Active No Primary status, and the 'to be graduated' indicator checked will have their status changed to Graduate with the withdraw code of Graduated - Dogwood. The status of Graduate is a Withdrawn status and functions the same way. The Withdraw code can be overridden by populating the Pre-transition Withdrawal code field, for example Completion – Evergreen may be used for students on the SCCP program of study.

Students remaining in grade 12 to complete course work should have the "RetainGrade" box checked and no 'withdraw' or 'to be graduated' box checked to have an Active enrollment status after **EOYR**.

The Graduate Seniors process does the following:

- Creates a withdrawal (W) enrollment record for the affected students' current school.
- Updates the students' withdraw code to "Graduated-Dogwood".
- Only updates Active and Active No Primary students with a YOG in the current year.
- Disables related user accounts.

Graduated students remain in the same primary school after EOYR in a Withdrawn state (the same as withdrawn students) with the status of Graduated and a Graduated-Dogwood code. No former school association is created for these students. ***Next school values are removed for Graduating Students.***

Use the *Pre-Transition* field set to set the appropriate values for Grade 12 students:

1. In the Query menu, using the Student Table select Year of graduation
  2. Set the Operator field to Equals and enter the Current Year.
  3. Click Add.
  4. Set the Search based on field to Primary Active Students.
  4. Click Submit.
5. Use *Options > Mass Update* or *Options > Modify List* to assign appropriate values to Grade 12 students. If you are using Mass Update, ensure that the intention is to update all the records in the list before proceeding.
    - a. **NextSkl > Name:** Only populate for a grade 12 student who is moving to another primary school next year.
    - b. **Next Homeroom:** Not applicable to grade 12 students who are graduating.
    - c. **Next HR Teacher:** Not applicable to grade 12 students who are graduating.
    - d. **Diploma/SCCP Date:** This field can be populated for Grade 12 students who are graduating or students completing their Evergreen Certification. This date prints on the PSR card for Graduation Requirements Met. There may be students in the list who already have a date populated and have returned to take additional courses. If the mass update function is being used, click on the Diploma Granted Date header twice to sort any populated fields to the top. These records can then be omitted from any mass update by selecting the checkbox beside the records and using *Options > Omit Selected*.
    - e. **RetainGrade\*:** Check this box only if the Grade 12 student is to be retained in the same grade and the EOYR process will add a year to the student YOG.
    - f. **Withdraw\*:** Checking this box is not necessary for students who are in Grade 12 and are graduating, the 'to be graduated' checkbox is also a withdrawal.
    - g. **To be Graduated\*:** Check this box for all graduating students not returning or continuing in another school.

\* Only one of these settings may be used for a student at EOYR, and not all students will require one of these settings.

### 14.1.3 Student Transferring Schools

EOYR performs the following actions for students moving to a new school:

- Creates a withdrawal (W) enrollment record for students' current school.
- Creates an entry (E) enrollment record for the students' next school, or current school if they are remaining in the same school in a different grade level.

**Note:** The Next School value will remain after EOYR. It is suggested these values be cleared out as a post-EOYR activity.

### 14.1.3 Student Movement Scenarios

|     | Student Movement  | Next School     | Diploma Granted Date | Only <u>one</u> of these settings may be used |                    |                 |
|-----|---|-----------------|----------------------|---|--------------------|-----------------|
|     |   |                 |                      | RetainGrade checkbox                          | Withdraw checkbox  | To be Graduated |
| A   | Student is staying in the same school.  | X – same school |                      |   |                    |                 |
| B   | Student moving to another MyEd BC school.   | X               |                      |   |                    |                 |
| C   | Student moving out of province, out of country, or to a non-MyEd BC school.   |                 |                      |   | X                  |                 |
| D   | Pre-Admit student for next school year  | X – same school |                      |   |                    |                 |
| E   | Student withdrawing from their primary school, but continuing a secondary school association with another school. Student status will be Active no Primary. |                 |                      |   | X – Primary School |                 |
|     | Grade 12 Student Movement   | Next School     | Diploma Granted Date | Only <u>one</u> of these settings may be used |                    |                 |
|     |   |                 |                      | RetainGrade checkbox                          | Withdraw checkbox  | To be Graduated |
| 12A | Grade 12 student who is graduating.   |                 | X                    |   |                    | X               |
| 12B | Grade 12 student who is graduating but returning for additional courses next year.  | X               | X                    | X   |                    |                 |
| 12C | Grade 12 student who is graduating but has continuing course(s) and secondary association to a secondary school. Student status will be Active no Primary.  |                 | X                    |   |                    | X               |
| 12D | Grade 12 student who is NOT graduating and is returning to the same school next year.   | X – same school |                      | X   |                    |                 |
| 12E | Grade 12 student who is NOT graduating and is moving to a different school next year.   | X               |                      | X   |                    |                 |
| 12F | Grade 12 student who is NOT graduating and is discontinuing schooling.  |                 |                      |   | X                  |                 |

\*Students are moved to their next school after which they are withdrawn from their original school.

### 14.1.4 Student Secondary School Associations (cross-enrolled)

Student secondary school associations without an end date or with a future end date (a date later than the EOYR process), will have a new secondary school association created at EOYR. Schools that wish to continue or end secondary school associations for students should review these end dates and update them as appropriate (rare for elementary schools).

|  |  |
|--|--|
| End dated on or before end of current year Enterprise calendar | Secondary school association is ended at EOYR  |
| Future end dated - Post EOYR (Oct 26, 20XX)                    | Secondary school association will be ended<br>New secondary school association will be created with the end date from the previous year record |
| No end date  | New secondary school association is created for the next school year.  |

Students withdrawn or graduated from their primary school with an open or next year secondary association will have the status of **Active no Primary** after EOYR. Students moving to a new primary school with open or next year secondary associations will have the status of **Active** after EOYR.

#### 14.1.5 Pre-Registered Students (for the Next Year)

Give ALL Pre-Registered (PreReg) students a Next School value. This will ensure these students will show in the next year filter for school numbers. Pre-Admit students using PreReg as the enrollment type and the correct YOG. The current grade for pre-admit Kindergarten student will show EL, the EOYR process will advance them to KF as long as the correct YOG has been entered. It is recommended that Pre-Admit dates are current dates for membership record accuracy and adjustments pre EOYR, MyEducation handles the Pre-Admit identification through the status of PreReg and not the date. EOYR will update the PreReg student E membership record to the first day of the new school year.

If a student needs to make a last minute change of schools before EOYR, there is no need to withdraw the student and enroll them in the new school. Instead, assign a new Next School value and EOYR will transition them to the new school.

EOYR performs the following actions for students with a Pre-Reg status:

- Changes their enrollment status to Active.
- Changes their primary school value to the value in the 'Next school' field.
- Updates the most recent entry enrollment record with a date of August 1st, 20XX (eg. 01/08/2019).
- Updates the most recent entry enrollment record to Active.
- Updates the most recent entry enrollment record with the "Next School" set on the PreTransition field set.

EOYR Health Check filters are available at the School view on the Student top tab. These filters work with the Pre transition field set to identify students with potential data issues heading into EOYR, and students who will be changing from Active to Active no Primary

##### 14.1.5.1 Pre transition field set – sort by column and review:

- Students set to 'RetainGrade', 'Withdraw' and 'to be graduated' to ensure the lists are accurate.

- Review the 'NextSkI>Name' field to ensure the schools are listed are on the MyEd BC Active Schools List on the L1 Information Station.

- ♣ Example: **Ooc – Other Schools** is not an active school. A student moving out of province or to a school not using MyEducation BC should have the next school field **blank** and the 'withdraw' flag checked. Use the Pre transition withdrawal code to identify movement.

- **Review the students with the Dip/SCCP date field** populated to ensure the correct students will have the date print on the PSR card.

- **Review the Pre transition withdrawal codes** to determine if they are the correct codes for the student.

### **School and District EOYR Filters:**

#### *14.1.5.2 EOYR – Future YOG flagged to graduate*

The Graduate Seniors process will only look at students with a current YOG. (See Graduating Students section) Students in this list will not be a part of the Graduate Seniors process.

Review the student records in this list to determine which settings should be changed. • If the student is not graduating, remove the 'to be graduated' flag

- Options if the student is graduating:
  - ♣ Change the YOG to the current year (Student > Options > Registration > Promote/Demote Student)
  - ♣ Or, withdraw the student prior to EOYR using the Graduate status and Graduated-Dogwood withdraw code

#### *14.1.5.3 EOYR – Multiple flags set*

Students may only have one movement flag set for EOYR. Review the student records in this list to determine which settings should be changed.

- Review the Student Movement Scenarios section to determine which setting is appropriate for the student.

#### *14.1.5.4 EOYR – Prior YOG still Active*

This filter provides a list of students with a prior year YOG and an Active enrollment status. These records require a review for accuracy to ensure the pre transition settings are correct.

Students with a prior year YOG and the 'to be graduated' flag set will not be included in the Graduate Seniors process.

- If the student is continuing next year:
  - o Review and change the YOG to the appropriate year for the student
  - ♣ Populate the next school if appropriate
- If the student is not continuing next year:

- ♣ Flag the student to withdraw and enter the appropriate withdraw code
- ♣ Or, withdraw the student prior to EOYR
- Options if the student is graduating:
  - ♣ Change the YOG to the current year (Student > Options > Registration > Promote/Demote Student)
  - ♣ Or, withdraw the student prior to EOYR using the Graduate status and Graduated-Dogwood withdraw code

#### *14.1.5.5 5 EOYR – Students becoming Active no Primary*

This filter provides a list of primary students with both the pre transition settings and Secondary Association settings that will result in a student status of Active no Primary next year.

Review the list of students and communicate as needed with the secondary school to determine if the student should be Active no Primary next year. If it is determined that Active no Primary will not be the correct status for the student, change the student settings as required.

- The student will be primary to the current Secondary School
  - ♣ Set the Secondary School as the Next School in the pre transition field set and remove the ‘withdraw’ or ‘to be graduated’ movement flag (Secondary school should also remove the next year association, or end date the current year secondary association). (Dip/SCCP date can be entered if appropriate)
- The student has completed work at the Secondary School and the school does not need access to the student record next year
  - ♣ The Secondary School can end date the secondary association prior to the end of the enterprise calendar year, or remove the next year secondary association as appropriate.

## 14.2 Other Tasks

### 14.2.1 General Programs

Students leaving for another school can have the school based general programs end dated.

#### *14.2.1.1 To end date General Student Programs*

1. Go to the School view.
2. In the Student top tab, select the Membership side tab
3. Click the Programs sub-side tab.
4. Click the Dictionary icon > Select General Program
5. Click Options > Modify List

6. Click the blue pencil icon in the End column
7. Enter the end appropriate end date for the general program
8. When complete, click the green checkbox to save the entries

Programs can be individually end dated by clicking into the details of the program instead of using Modify List.

Do not end date the current **Student Services 1701 Designation Program**. The designation record alerts the receiving school/district that a support plan may be needed.

#### 14.2.2 Student Conduct Incidents

Districts or schools that do not wish to have student conduct incidents travel to another school or the next school year, can choose to have these set to expire.

All Incidents with an expiry date that is on or before EOYR will be deleted when the Enterprise job is run to remove expired incidents.



##### 14.2.2.1 To set expiration dates for individual student incidents

1. Go to the School view.
2. In the Student top tab, select the Conduct side tab
3. Click the Incident sub-side tab.
4. Click the blue hyperlink of the incident to expire.
5. Populate the Expiration Date field.
6. Click Save.

The screenshot shows a web form for an incident. On the left, there are input fields for Primary codes (Attendance Issues), Additional codes (Add), Incident Date (20400217), Incident Time (9:32 AM), and Location. On the right, there are fields for Incident ID (00163005), Investigation status (N/A), Owner - Name (Cotak, Kestyaupul), Referral Staff - Name, and Victim/Target - Name. The Expiration Date field at the bottom right is highlighted with a red border and contains a calendar icon.

##### 14.2.2.2 To Set Expiration Dates for Multiple Student Incidents

Remember: Mass Update and Modify List functions can only be performed on Primary Active students. Set the filter to Primary Active Students if you intend to use these functions.

1. Go to the **School** view.
2. In the **Conduct** top tab, select the **Incident History** side tab.
3. Click the  icon and select the **Expiring Conduct Incidents** field set.
4. In the **Options** menu, select **Modify List**. Click the  icon to make the fields editable.



5. Populate the **ExpDate** field and *click the green check mark to save.*




#### 14.2.2.3 To Edit Multiple Student Journal Entries

**Remember:** Mass Update and Modify List functions can only be performed on Primary Active students. Set the filter to Primary Active Students if you intend to use these functions.

**Note:** Converted student journal entries that do not have the “Time” field populated will not allow the user to save the record until a time is entered in the record.

1. In the **School** view, select the **Global** top tab.
2. Click the **Student** side tab.
3. Select the **Student Journal** table by clicking the blue hyperlink. This will present a list of records if student journal entries have been recorded.
4. Click the  icon and select the **Default** field set.
5. In the Options menu, select **Modify List**. Click the  icon to make the fields editable.
6. Populate the **ExpDate** field and click the green check mark to save.



#### 14.3 Check Former School & Secondary School Association End Dates

1. In the **School** view, select the **Global** top tab.
2. Click the **Favourites** side tab.
3. Select the **Student School Association** table by clicking the blue hyperlink. This will present a list of records of student school associations.
4. In the **Options** menu, select **Query**.
  - a. Leave the **Tables** field at **Student School Association**.
  - b. In the **Fields** area, select **Association type**.



- c. In the **Operator** area, select **Equals**.
  - d. In the **Value** field, select **Former** or **Secondary as appropriate**. Click **Add**. The selection should appear in the **Search Criteria** box.
  - e. Set **Search based** on to **All Records**. Click **Search**.
5. Review the records in the list and note records that **do not** have an **End Date**.
6. Populate the **End Date** to a date on or before the current year Enterprise calendar year end field to ensure the association is ended through EOYR.

## 15.0 1701 Reporting

The information collected on Form 1701 is used in the calculation of Full Time Equivalent (FTE) students for public schools. The FTE values are then used to determine funding levels based on School Type.

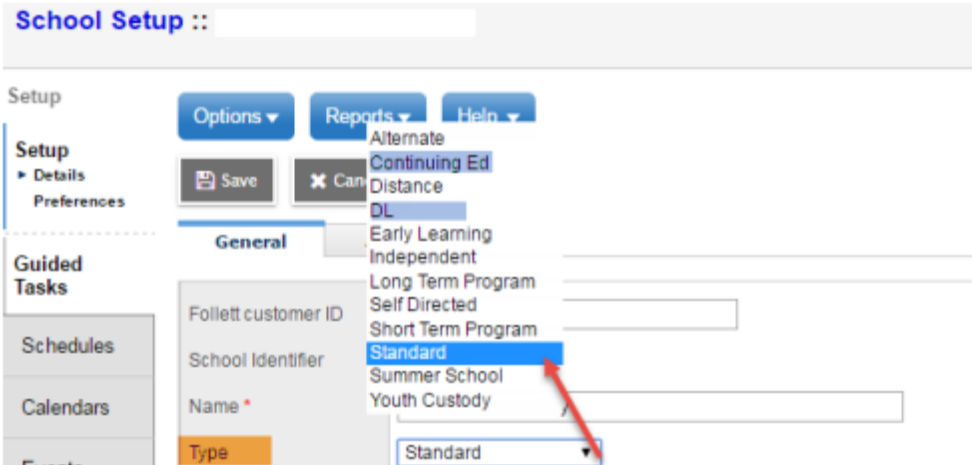
Specific information on how students are counted in different scenarios can be found on the Ministry of Education data collections site at: <http://www.bced.gov.bc.ca/datacollections>

This document identifies where the data for 1701 is drawn from in **MyEducation BC**, how it may be verified and extracted, and resources which may be used to assist in data entry.

### 15.1 Locating the 1701 Fields

#### 15.1.1 School Type

**School view > School top tab > Setup side tab > Details**


| Fields included in 1701 Reporting:   | Field name  |
|--|-------------|
|  | School Type |

#### 15.1.2 Basic Demographic Data

**School View > Student top tab > select student > Details side tab > Demographics sub-top tab**

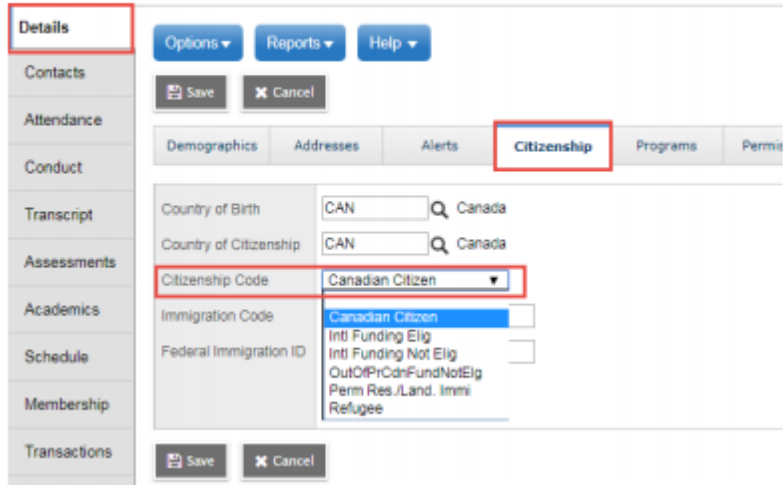
| Fields included in 1701 Reporting: | Field name  |
|------------------------------------|---|
|                                    | Pupil #<br>Personal Education Number<br>Legal last name<br>Legal first name<br>Legal middle name<br>Gender<br>Date of birth<br>Grade level<br>Grade sub level<br>Status = Active or Active No Primary |

School View > Student top tab > select student > Details side tab > Addresses sub-top tab

- When you click the  button in the City Prov PC field, ensure in the pop-up window that the Postal code is formatted correctly in the correct field.

| Fields included in 1701 Reporting: | Field name  |
|------------------------------------|-------------|
|                                    | Postal Code |

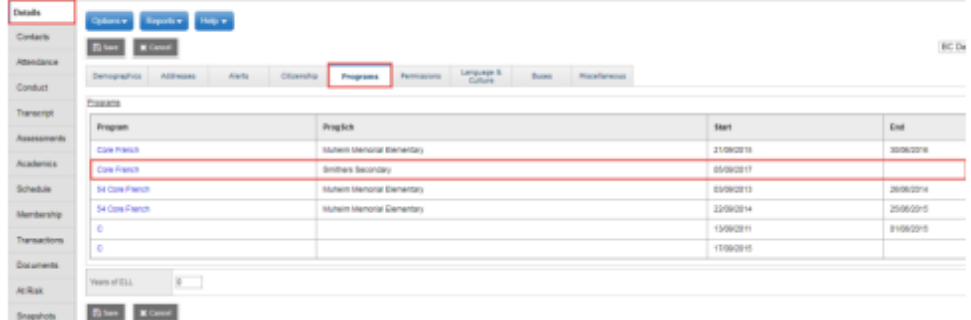
School View > Student top tab > select student > Details side tab > Citizenship sub-top tab

| Fields included in 1701 Reporting:  | Field name       |
|---|------------------|
|  | Citizenship Code |

School View > Student top tab > select student > Details side tab > Language and Culture sub-top tab

| Fields included in 1701 Reporting:  | Field name  |
|---|---|
|  | Home Language<br>Aboriginal Ancestry<br>Band of Residence |

School View > Student top tab > select student > Details side tab > Programs sub-top tab

| Fields included in 1701 Reporting:   | Field name      |
|--|-----------------|
|  | Active Programs |

### 15.1.3 Course Information

School View > Student top tab > select student > Schedule side tab

- The courses that are included for 1701 reporting vary, depending on the grade level of the student, the school type the student is attending and the course type.

Refer to the Ministry of Education 1701 Instructions for details on which courses are counted as valid for 1701 reporting.

| Fields included in 1701 Reporting: |  |  |  |  |  |  |  |  |  | Field name |
|------------------------------------|--|--|--|--|--|--|--|--|--|------------|
|                                    |  |  |  |  |  |  |  |  |  | Courses    |

**School view > Student > select student > Transcript > Details**

For schools identified with a Type of “Continuing Ed” or “DL”, only courses with a valid active date will be counted (**Active Date** field).

**Active dates can be viewed and modified “en masse” in the Grades top tab > Transcripts side tab > Active Dates field set.**

For current year scheduled courses, schools will need to prepare grade input for Course dates in order to enter and post active dates for the current 1701 submission window

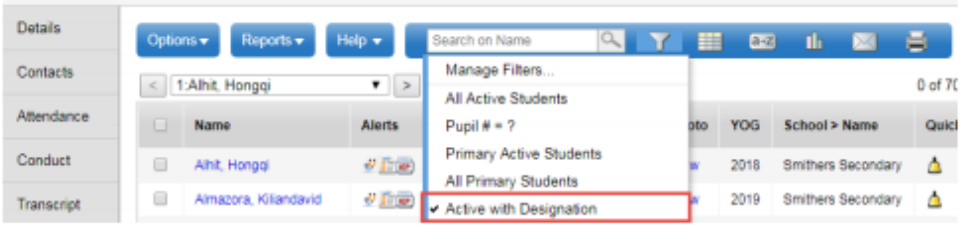
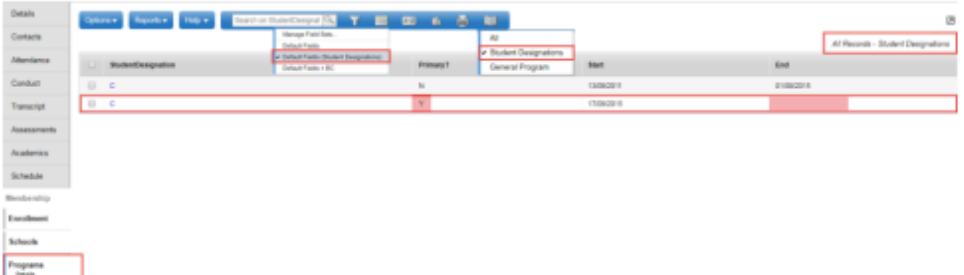
| Fields included in 1701 Reporting: |            | Field name   |
|------------------------------------|------------|--------------|
| Course Start Date                  | 08/09/2015 | Active Dates |
| Course End Date                    | 30/06/2016 |              |
| Actual Start Date                  | 06/04/2016 |              |
| Active Date                        | 06/04/2016 |              |
| Percent Complete                   |            |              |
| Completion Date                    | 22/06/2016 |              |

#### 15.1.4 Learning Services

A student can only have ONE **primary** Ministry Designation for funding purposes.

From the **School view > Student** top tab students who have a Ministry Designation can be displayed using the **Active w/ Designation** filter.

Schools can also run the BC 1701 Student Services report located in Student top tab > Reports menu > Ministry Reporting.

| Fields included in 1701 Reporting:   | Field name                  |
|--|-----------------------------|
| <p><b>Student List</b></p>  <p>Users with appropriate security can add, revise or end date any student designation in the District or School Views &gt; Programs side tab. <i>Please refer to the <b>1701 Student Services Designations</b> document for information on how to assign, modify or end Ministry Designations.</i></p>  | <p>Ministry Designation</p> |
|  | <p>Ministry Designation</p> |

## 15.2 Student Program Codes

All 1701 Program Codes, and Funded ELL Codes are available for all schools to use at the Enterprise level. Some Districts have created District Level 1701 Codes, and ELL Codes. The system allows Districts to create a program using a code that is already in use by another District, which can result in a student program displaying incorrectly in the 1701 export and report. If a Student displays the wrong Enrolled Program Code on the 1701, have your District's Level 1 person submit a ticket to the service desk for assistance.

The District Setup Guide provides instructions on how to create a District Program Code.

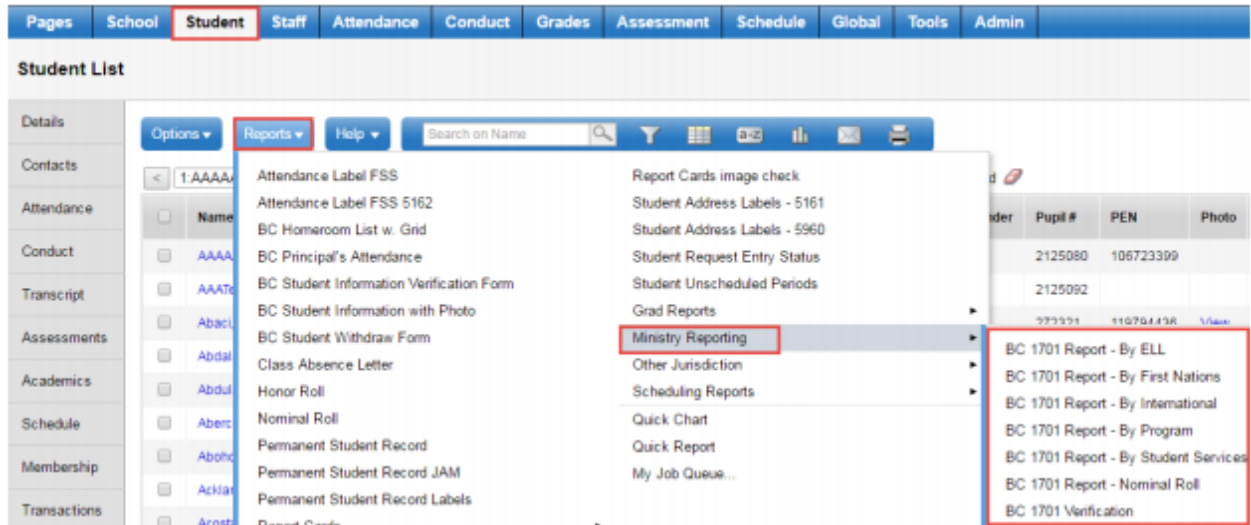
### 15.2.1 Student Program Codes

Summer Schools have unique 1701 reporting requirements. Schools and Districts ensure that the students, courses and designations meet the Ministry of Education funding requirements. Options are provided on the export parameter form to allow for the exclusion of certain students or designations.

## 15.3 1701 Reports for Verifying the Data

There are many reports available to support your verification of 1701 Data. To find these reports:

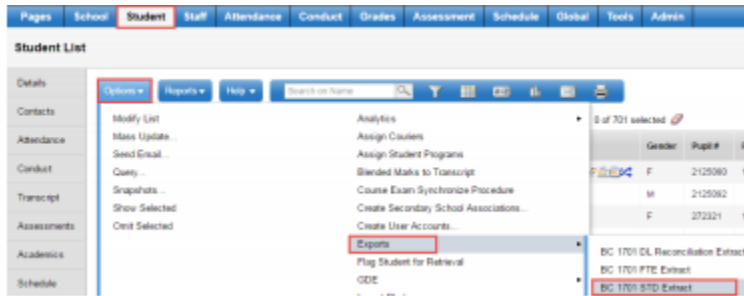
**School or District > Student > Reports > Ministry Reporting**



**15.3.1 Running the 1701 Extracts**

Three 1701 extracts are currently available: School or District > Student > Options > Exports

- BC 1701 DL Reconciliation Extract
- BC 1701 FTE Extract
- **BC 1701 STD Extract** (This is the file uploaded to the Ministry site)



In the BC 1701 STD extract pop-up parameter screen, select the appropriate options:

1. **School Type:** Determines the format of the extract and the options available on the parameter pop-up window.

- a. Regular and DL for all schools except Summer Schools
- b. Summer School for Summer Schools only

2. **Select School(s):** Select the school the extract is being run for. School users will only have the option to select schools they are connected to. District users will have the option to select multiple schools.

3. **Grades:** Use the drop-down menu to select the grades to be included in the extract.

4. **Distributed Learning – Active Course Date:** If the school type is a distributed learning or continuing education school, populate the appropriate Active Course Date for this 1701 reporting period. (the first calendar day after the last funding snapshot date)

5. **Summer School Options:** available when Summer School is selected in School Type a. Students to Include:

- i. **Funded:** export file includes students eligible for summer school funding
  - ii. **Adult:** export file includes adult students only and file name will specify adult
- b. **Display Designation:** The option to include student designation is available for summer schools

6. Click **Run** and save the .std extract on your local workstation to upload to the Ministry site.

## 16.0 Class Size and Composition

### 16.1 What is a Class?

Each row in the web form represents the distribution of headcount students in a class, assumed to be lead by one teacher. There can be considerable variation in how education is delivered in regular schools across the province, so this simple view may not always fit every situation. For example, if a class is taught by two teachers, both of whom are in the classroom at the same time, ***the class should be split on two lines***. Similarly, if ***multiple courses are taught in the same classroom by one teacher***, these should be **reported together** as a **single** class. Note that schools and districts may need to assess whether some specific classes should be included or not. This decision should be guided by the more **formal definition of a class**, which is defined in the Class Size and Compensation Regulation as: ***“A group of students scheduled to be together at least twice a week with a teacher for the purposes of engaging in an educational program.”***

Schools will enter their class organization information manually by creating a file from MyEd BC and will review and verify their data’s accuracy. Please build your extract according to ministry specifications.

### 16.2 Summary of Class Size and Composition Instructions

Please open the "20XX\_Sample\_Class\_Size" file that is sent to you in September

- Save a copy of the spreadsheet in .odt or xls format with your school name added to the file name (ie: "KELSET\_Class\_Size & Composition\_2018")
- Prepare this document in a spreadsheet -**LibreOffice Calc** or **Excel**
- For **Subject Code**, please use the **ministry codes** for each course

- **Subject Area**

To support better reporting and analysis, Subject Area has been added to the collection. For **elementary** classes teaching a range of subjects, select “00 – Full Grade”. For secondary classes, choose the category that best fits the course being delivered from the list provided:

- 00 - Full Grade
- 05 - Applied Skills
- 10 - English Language Arts
- 15 - Fine Arts
- 20 - Health and Career Planning
- 25 - Information & Communications Technology
- 30 – Languages
- 35 – Mathematics
- 40 - Physical Education
- 45 – Sciences
- 50 - Social Studies
- 60 - Special Ed
- 65 - Other

- In the **Class/Div Name** include the *usual* name of the class or division. (Grade 6; Div 2; English 9)
- Please ensure that you **do not use** the KH column. The ministry has not updated their web form and therefore the KH column hasn’t been removed though it is irrelevant.
- The **Section column** of the spreadsheet is optional and free form (max of 10 characters)
- **Headcount by Grade:** For each student in the class, **enter the number of students by the grade of the student**. For example, if there are **3** Grade 8 students, **10** Grade 9 students, and **3** Grade 10 students in a French 9 class together, the headcount by grade would appear as follows:

| Class    |  | Gr 7 | Gr 8 | Gr 9 | Gr 10 | Gr 11 | Gr 12 |
|----------|--|------|------|------|-------|-------|-------|
| French 9 |  |      | 3    | 10   | 3     |       |       |

If there are any Elementary Ungraded (EU) or Secondary Ungraded (SU) students in the class, **report them in the most appropriate grade** for that student. *For example, if the student is primarily in grade 10 classes, but is taking classes in other grade levels as well, then report them as grade 10.* If the student **cannot be identified as being in any one grade**, then **report them in the grade level of the course**. In the example above, the *ungraded student* could be added to the *grade 9* headcount.

- **Secondary schools-** Please remember to put year-long **two-course** classes into separate rows.
- Please **do not** hide or delete any of the columns of the spreadsheet prior to sending to the SBO
- The **32<sup>nd</sup>** column (AF) is the “**meets negotiated limits**” column. The cells in this column **must** be populated for **every** class. Expected value: **Yes, No or No with a reason**. “**Yes**” if the class is in accordance with the negotiated size and composition limits. If **No**, and still meets the Class Size and compensation regulations then provide an “**explanation**” for example-Band class. If it does not meet Class Size and Compensation regulations then indicate “**No**”
- **No more than 250 characters in each cell.** Remember that the data in this column should be free form without carriage returns, line feeds, double quotes, or any characters not found on your keyboard because they will just be removed.
- Please do not put zeros in empty columns.
- Please include **EA hours** (column R) **Y or N**  
 \*\*The hours of support provided at the classroom level should be included in the “**Schools Total Average Weekly EA Hours**”. **Include** all Education Assistants (EA) who provide support in each classroom. **This includes** Learning Assistance, Special Education, Resource Room, or Aboriginal



*Education support staff, if the staff are engaged in providing temporary or continuous classroom support at the time of this collection. Include EA support funded by other government agencies.*

**Exclude** EA support providing **non-classroom** services such as recess, lunchtime, transportation, or library support.

- **Headcounts of Students by Category (Special Education/Gifted/ELL)** Identify students in classes that meet the criteria for one of the following categories:
  - Students by specific special needs category (excluding Gifted)A student is entitled to an IEP if the student meets two conditions (from the Individual Education Plan Order):
  - 1) The student is **identified** as a student with special needs.
  - 2) The student is **not entitled** to an IEP if:
    - a) The student requires **no adaptation** or **only minor adaptations** to education materials, or instructional or assessment methods;
    - b) The expected learning outcomes established by the applicable educational program guide **have not been modified** for the student; and
    - c) The student requires in a school year, 25 hours or less remedial instruction, by a person **other than** the classroom teacher, in order for the student to meet the expected learning outcomes referred to in b) above

Include international students in the ELL column only if this is an appropriate reflection of their support needs. **The student does not need to qualify for ELL funding to be included in this field count.** Each student should **only be counted once** in the category section. If a student meets the requirements of more than one category shown, then **only report them once** under the category representing the highest support needs. *For example, a student who is designated as a student entitled to an IEP and is ELL would generally be reported only once under the specific Special Ed/IEP category. Similarly, if a student is both Gifted and ELL, then the student would most likely be reported under ELL.*

### 16.2.1 Additional Requirements regarding entering information into MyEd BC

- **All** enrolling teachers are to be entered into **MyEd BC** (e.g. teachers who are taking over the class). This does **NOT** include Librarians, ISTs, Reading Recovery Teachers, etc.
- The **maximum class size**, as agreed between the teacher and the principal, **must** be entered in **MyEd BC**.

#### **Based on this district's contract language:**

- A section (class) can only have 1 student with a designation of H and;
- The overall total enrollment of sections, with an H designated student must drop by 1.
- A section cannot have more than 3 designated students', excluding P (gifted) designated students.

## 17.0 Preparing for Scheduling Schools for Next School Year

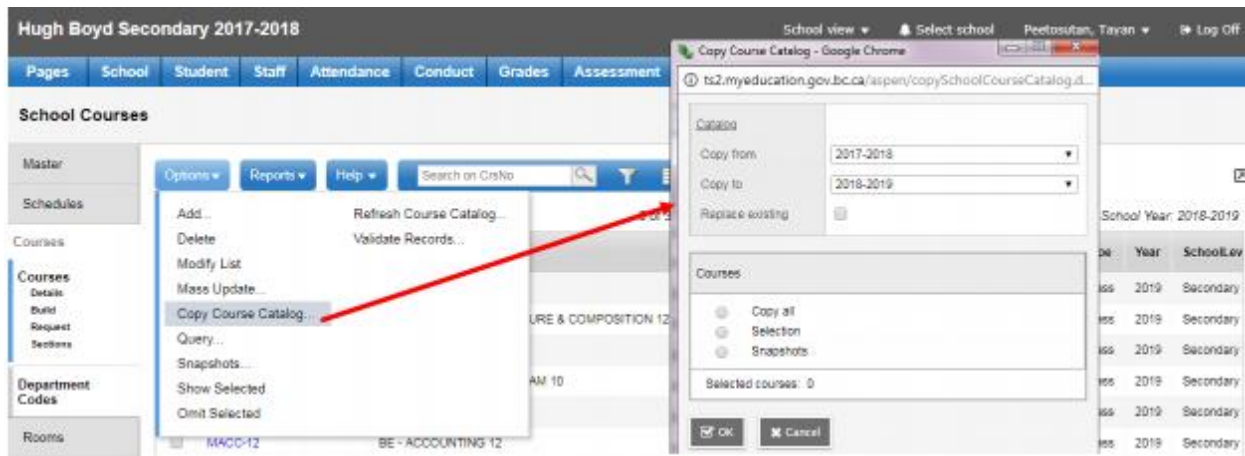
### 17.1 Create Course Catalogue for the Build Year

Once the District L1 has reviewed and adjusted the District Course Catalogue and then copied it to the next school year, than schools can copy their current year course catalogues into the next school year. At this time schools may also pull new courses into the next year's course catalogue.

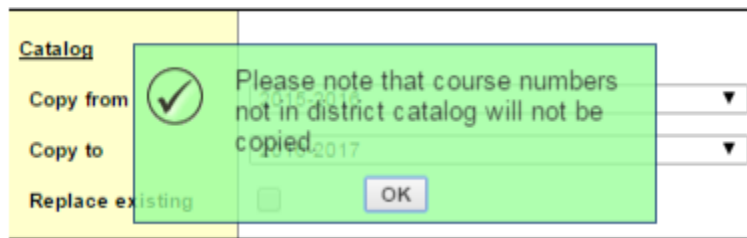
### 17.1.1 Steps to Copying the School Course Catalogue into the Next School Year

School course catalogues can be copied forward from one year to the next. In order to do so, the course must first exist in the district course catalogue.

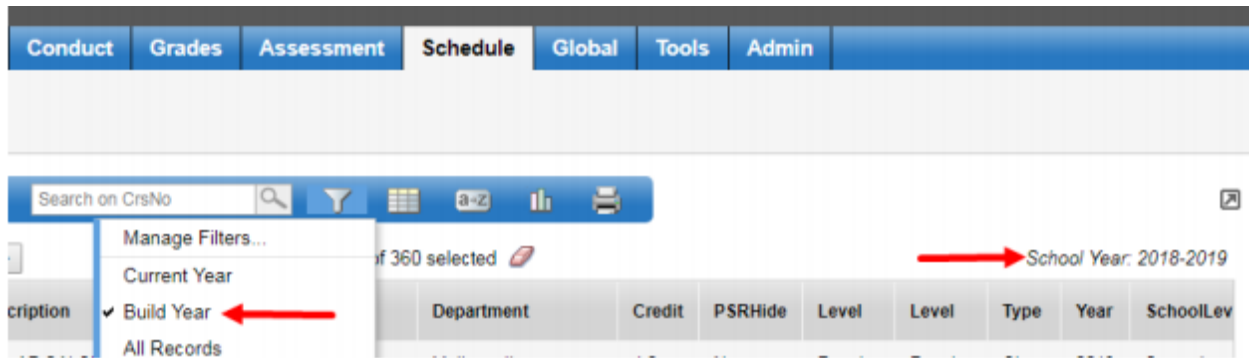
- Log on to the School View
- Click the Schedule top tab
- Click the Courses Side tab
- Go to Options and select, Copy Course Catalog
- From the popup window:
  - ♣ Select the year to copy from and the year to copy to
  - ♣ Note the option to “Replace existing”
  - ♣ Select to Copy all, copy a Selection, or copy from a Snapshot.



- ♣ The message shown below displays as a reminder courses must exist in the district course catalogue. Unlike at the district level, there will be no follow up message indicating which courses were not copied as a result of missing from the district catalogue.

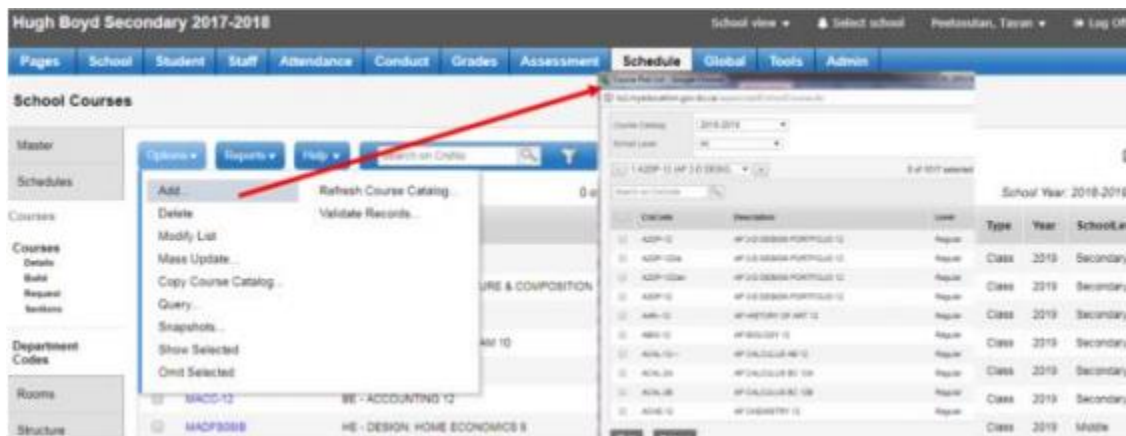


- ♣ Once complete, change the filter to the build year and check the number of courses



### 17.1.2 Pulling Courses from the District to the School Course Catalogue

- Log on to the School view.
- Click the Schedule top tab.
- Click the Courses side tab.
- Click the icon and ensure Build Year is selected.
- Click Options on the menu and select Add. The Course Pick List pop-up window appears, displaying the district course catalogue. **Ensure the Course Catalogue reflects the build year** and that **School Level field** is set to **All** to view the entire course catalogue.



- Check the box beside the course(s) required.
- Click OK. This adds the selected course(s) to your Courses side tab.
- Go to the Courses side-tab and perform a search for the course you selected.
- Check the box beside the course and click the Details leaf.
- Populate the fields as appropriate for the school.
- Click Save.
- Click on the Grading sub-top tab

## Creating Copies of Courses (Flavours) at the School

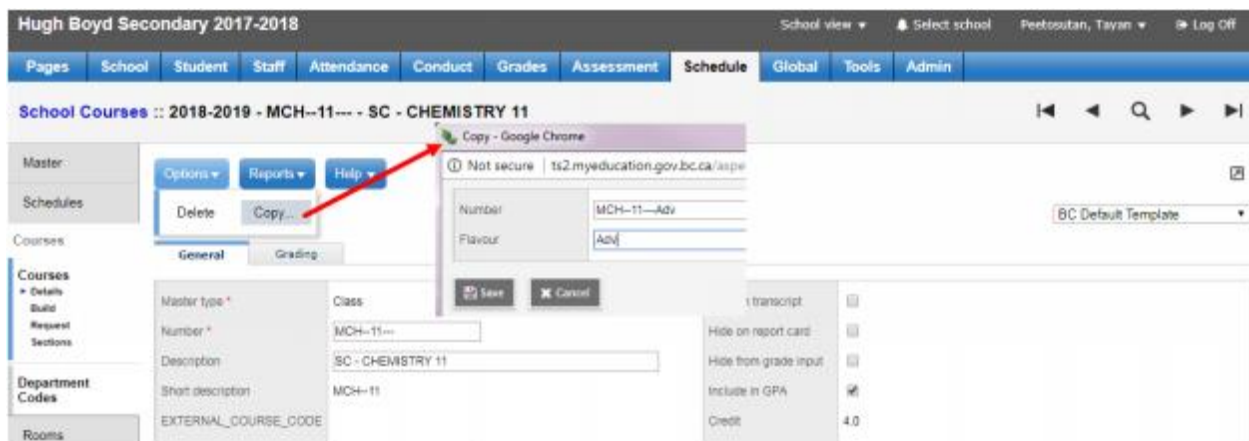
The ability to create more than one version of a course (course flavours) requires that specific settings are in place at the district level.

For schools to create copies of courses, the district must have created a copy first. Schools can see this copy (not the flavour), bring it into their own school and create additional copies. A flavour is required but has limited value. Consultation with district L1 may be required if schools need additional courses created at the district level.

### 17.1.3 Creating Flavours at the School Level

- Log on to the School view.
- Click the Schedule top tab.
- Click the Courses side tab.
- Check the box beside the course that requires a flavour.
- Click the Details leaf.
- Click Options on the menu and select Copy.
- Populate the Number field with the course code you are copying, adding the appropriate number of characters required by the district preference setting.
- Populate the Flavor field with a description of the copied course – this may be a course code or description.

**Note:** The Flavour field is just a description. The actual flavour is the unique course code.



- Click Save.
- Return to the Courses side tab. The course copy will now appear in the school course catalogue.
- Populate the details on the General and Grading tabs for the copy.

#### 17.1.4 Define Next School for Students

Students need to have a Next School value set, in order to assign them course requests. This value can only be set, for Primary Active students at your school.

From the Student top tab in the School view, select the Primary Active Students filter, then the Pre-Transition field set. This field set contains the next school (NextSKL>Name) field. Setting this field determines the student's primary school following End of Year Rollover.

The next school field is mass-updateable. It can also be set using Modify List or from within a student's details screen.

The screenshot shows the 'Student List' interface for 'Hugh Boyd Secondary 2017-2018'. The top navigation bar includes 'Pages', 'School', 'Student', 'Staff', 'Attendance', 'Conduct', 'Grades', 'Assessment', 'Schedule', 'Global', 'Tools', and 'Admin'. The 'Student List' section has a search bar and a table of students. A red arrow points to the 'NextSKL > Name' column header in the table.

| Name               | Pupil # | Alerts | DOB        | YOG  | Grade | GrSubLvl | EnrStatus | School > Name       | NextSKL > Name         |
|--------------------|---------|--------|------------|------|-------|----------|-----------|---------------------|------------------------|
| Abeler, Trem       | 1260357 |        | 28/09/2002 | 2020 | 10    |          | Active    | Hugh Boyd Secondary | Hugh Boyd Secondary    |
| Acevedolopez, Love | 2114423 |        | 20/01/2004 | 2022 | 08    |          | Active    | Hugh Boyd Secondary | North Island Secondary |
| Ademzeinul, Jiyar  | 644241  |        | 11/07/2003 | 2021 | 09    |          | Active    | Hugh Boyd Secondary | Hugh Boyd Secondary    |
| Adkaram, Amylia    | 538363  |        | 05/06/2001 | 2019 | 11    |          | Active    | Hugh Boyd Secondary | Hugh Boyd Secondary    |

#### 17.1.5 Rollover Secondary School Assignments for Staff

Primary teachers at your school do not need to be rolled over to the build year. If a teacher exists in the active year, they will be available for scheduling in the Build year.

If you know staff positions we be required next year, but do not know the staff's name fake staff can be created, e.g. Eng1 2019, Eng2 2019

When you are preparing to build your school's schedule for next year, and your teachers have secondary school associations, you can roll over those associations to build the schedule for next year.

To roll over secondary school assignments for staff members:

- Log on to the School view.
- Click the Staff tab.
- On the Options menu, click Rollover Staff Schools. The system asks if you want to roll over the current secondary school staff associations to the build year.
- Click OK.

#### 17.1.6 Define New Secondary School Assignments for Staff

Defining new secondary school assignments for staff is best managed at the district level by an administrator or L1 Support that has access to all staff. From the Staff top tab in either the School View or District View, click on the Schools side tab > Options > Add. Complete the form as needed.

Hugh Boyd Secondary 2017-2018 School view Select school Peetosuta

Pages School Student Staff Attendance Conduct Grades Assessment Schedule Global Tools Admin

### Student List

Details Options Reports Help Search on Name

Contacts 1:Abeler, Trem 0 of 675 selected

| Name               | Pupil # | Alerts | DOB        | YOG  | Grade | GrSubLvl | EnrStatus | School > Name       | NextSKI > Name         |
|--------------------|---------|--------|------------|------|-------|----------|-----------|---------------------|------------------------|
| Abeler, Trem       | 1260357 |        | 28/09/2002 | 2020 | 10    |          | Active    | Hugh Boyd Secondary | Hugh Boyd Secondary    |
| Acevedolopez, Love | 2114423 |        | 20/01/2004 | 2022 | 08    |          | Active    | Hugh Boyd Secondary | North Island Secondary |
| Ademzeinul, Jiyar  | 644241  |        | 11/07/2003 | 2021 | 09    |          | Active    | Hugh Boyd Secondary | Hugh Boyd Secondary    |
| Adikaram, Amylia   | 538363  |        | 05/06/2001 | 2019 | 11    |          | Active    | Hugh Boyd Secondary | Hugh Boyd Secondary    |

## 18.0 Scenarios

A build scenario defines the structure of the schedule that a school would like to build for next year, including the schedule terms, number of periods, and number of days per cycle.

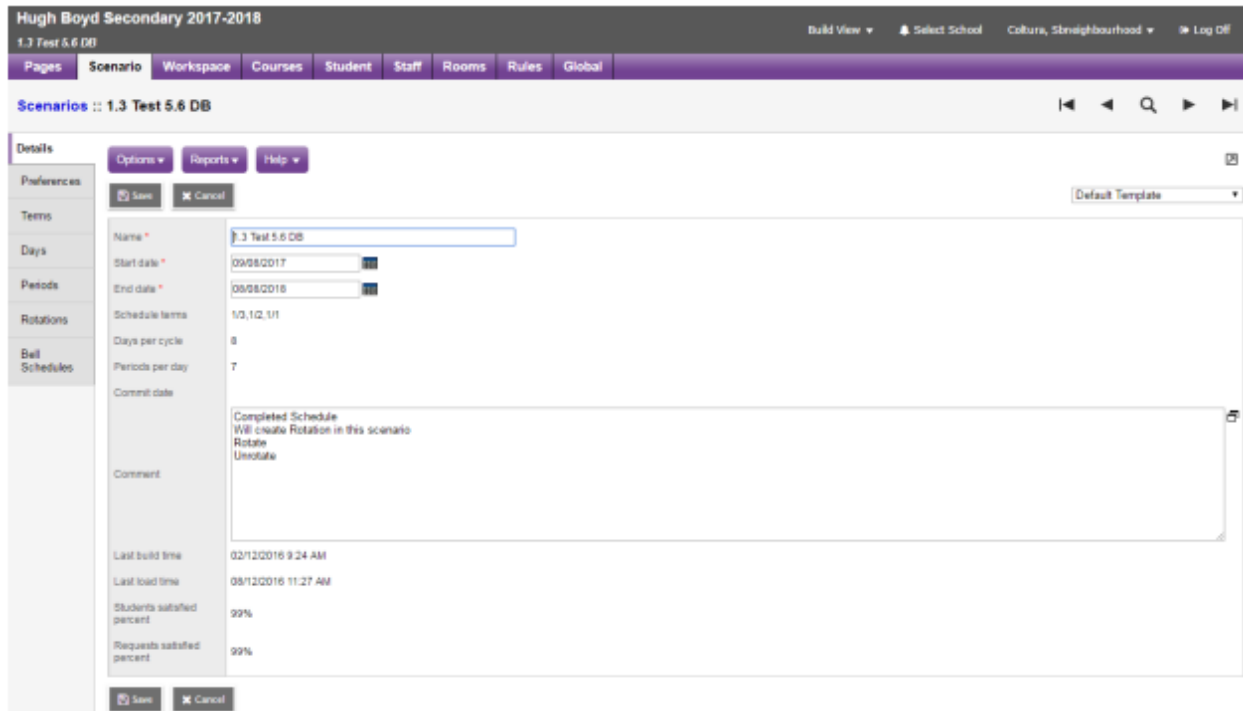
Several build scenarios can be created to test out different structures. For example, a school might use a scenario to build their traditional master schedule. Even if they are happy with the schedule, they may want to tweak it to see if they can get a better schedule. To be safe, schools should copy the scenario and schedule and just tweak the copy. Then, they would only commit the schedule they will actually use next year. Depending on the scenario preferences selected, attributes of each can be shared or they can be distinctly unique.

### 18.1 Creating Scenarios

There are two ways to create the schools initial scenario: by Adding new or Copying the existing active schedule.

#### 18.1.1 Add New

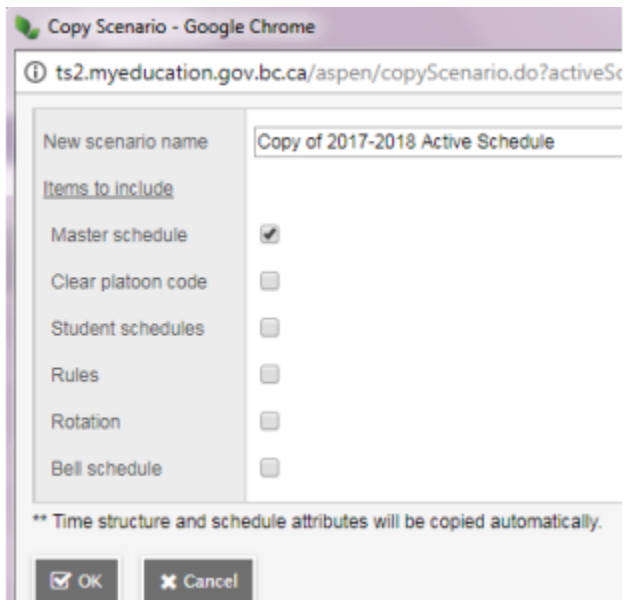
1. Build view.
2. Click the Scenario tab.
3. On the Options menu, click Add. The New Schedule page appears.
4. Enter a name for the scenario. If more than one scenario is being created, use short descriptive names, e.g. 1-12Feb.
5. The system enters the start and end dates that coincide with the build context year. There is no need to change these dates.
6. Comments area: This is a text box which can be used to describe this scenario. Comments are very helpful if you will be creating multiple scenarios.
7. Click Save.



### 18.1.2 Copy Active Schedule

Build view > Scenario > Options > Copy Active Schedule...

A new parameter window opens providing options on specific parts you would like to copy.



| Field               | Description   |
|---------------------|---|
| New scenario name   | Enter a name for the scenario. If you plan to create more than one scenario, use short descriptive names. E.g. 1-12Feb              |
| Master schedule     | Check if you want to copy the current year Master Schedule  |
| Clear platoon codes | Check if you want to copy platoon codes from students and sections  |
| Student schedules   | Check if you want to copy students existing schedule  |
| Rules               | Check if you want to copy Load rules. Build rules do not exist in the School view. All Rules can be copied into the scenario later. |
| Rotation            | Check if you want to copy the existing rotation. If this is selected, the schedule CANNOT be rotated again                          |
| Bell schedule       | Check if you want to copy existing Bell schedules All Bell schedules can be copied into the scenario later.                         |

### 18.1.3 Scenario Preferences – Scenario Basic

Define build scenario preferences that you want the system to consider when building the schedule with this scenario.

**Note:** During the School year, you can view the build scenario preferences for the current master schedule in the School view. Click the Schedule tab, and the Preferences side-tab.

To define build scenario preferences:

Build view > Scenario > Select the scenario > Preferences > Category defaults to Scenario – basic

### 18.1.4 Schedule Expression Format

The default for the schedule expression is Period first. The period is displayed in the schedule expression first, followed by the day i.e. P(D)



**Note:** It is recommended that districts decide on a standard expression format for all schools to follow. The only indication of this setting in the School View is found from Schedule > Preferences which will display the preferences as shown above, for the current school year. Viewing schedule expressions as displayed within the application will not indicate the set preference.

#### 18.1.4 Use Numeric Section Numbers

Check this box to have the system generate numeric section numbers. Section numbers can be manually changed. If this box is checked it will ensure when a section is added, it will be sequential in numbering.

#### 18.1.5 Scenario Preferences – School

‘Shared build year scenario’ functionality allows for sharing secondary student schedules, with the student’s other schools

Pages Scenario Workspace Courses Student Staff Rooms Rules Global

Scenarios :: 1.3 Test 5.6 DB

Details Options Reports Help

Preferences Save Cancel Category: School

Basic Advanced

**General**

Schedule mode: Secondary

Elementary schedule grade level cut-off: 07

Section number pad length: 2

Shared build year scenario: 2 Test 5.6 DB

Allow build year request edits:

Align teacher assignment with certification:

**Student Subject Selection**

Disable automatic recommendation acceptance:

Subject selection fields: academicLevel, credit

**Teacher Recommendation**

Show recommendations in School view:

Enforce recommendation code match:

Teacher recommendation fields:

**Student Schedules**

Student schedule sort order: scheduleDisplayTermView.section.scheduleTrackId.sectionId

Student schedule matrix cell: section.courseView.section.description, section.staffView.se

**Student Schedule Workspace**

Student schedule fields: section.courseView.section.description

Master select fields: courseView.description, staffView

Allow future add/drop:

Allow post add/drop:

Pending student schedule change fields: changeTypeCode, effectiveDate, masterSchedule.courseView

Align add/drop date window (days): 60

Pages Scenario Workspace Courses Student Staff Rooms Rules Global

Scenarios :: 1.3 Test 5.6 DB

Details Options Reports Help

Preferences Save Cancel Category: School

Basic Advanced

**Miscellaneous**

Pattern day IDs: 1,2,3,4,5,6,7,8,9

Pattern period IDs: A,B,C,D,E,F,G,H,I,J,K,L,M,N

Schedule on client machine:

Number of sections deleted with warning: 0

#### 18.2 Copy a Scenario

Users can create a new scenario copied from an existing scenario. If you copy a scenario from a different schedule build year, the system does not copy the term dates from that year.

To copy a build scenario:

1. Log on to the Build view.

2. Click the Scenario tab.
3. Select the scenario you want to copy, and click the Details side-tab.
4. On the Options menu, click Copy Scenario. The Copy Scenario dialog box appears:

New scenario name: Copy of 1.3 Test 5.6 DB

Items to include

|                    |                                     |
|--------------------|-------------------------------------|
| Master schedule    | <input checked="" type="checkbox"/> |
| Clear platoon code | <input type="checkbox"/>            |
| Student schedules  | <input type="checkbox"/>            |
| Rules              | <input checked="" type="checkbox"/> |
| Rotation           | <input checked="" type="checkbox"/> |

\*\* Time structure and schedule attributes will be copied automatically.

OK Cancel

5. Type a name for the new scenario.
6. Select the checkbox of the items you want to copy from the original scenario to the new scenario. For example, you might want to carry over the rules created but not the student schedules.

New scenario name: Copy of 1.3 Test 5.6 DB

Items to include

|                    |                                     |
|--------------------|-------------------------------------|
| Master schedule    | <input checked="" type="checkbox"/> |
| Clear platoon code | <input type="checkbox"/>            |
| Student schedules  | <input type="checkbox"/>            |
| Rules              | <input checked="" type="checkbox"/> |
| Rotation           | <input checked="" type="checkbox"/> |

\*\* Time structure and schedule attributes will be copied automatically.

4. Select the pieces of the active schedule you want to copy into this new scenario, such as the master schedule, rules, and rotations. Select the Clear platoon code check-box if you want to clear the platoon codes associated with the active schedule.

**Note:** Only checkboxes for items that apply to your scenario appear. For example, if the active schedule does not use a bell schedule, you will not see a Bell schedule checkbox.

6. Click **OK**.

### 18.3 Terms

Schedule terms are the date ranges during which a course can begin and end.

For the functionality of Update Designation/ELL Tallies, to accurately determine student program participation (ELL) Term start and end dates need to be added.

From the Build View, go to the Scenario top tab and click on the desired scenario. Go to the Terms side tab. Terms carried over from the current year will be displayed. It is important to click into the details of each schedule term. All schedule terms must have a schedule term code in the Schedule Term reference table. Some current year codes have been converted without existing in the reference table. These can be identified by an asterisk (\*) beside the code.

| Code | Name       | BaseTPY | CoveredTPY | BaseMap | UniversalMap |
|------|------------|---------|------------|---------|--------------|
| FY   | Full Year  | 1       | 1          | 1       | 111111       |
| S1   | Semester 1 | 2       | 1          | 10      | 111000       |
| S2   | Semester 2 | 2       | 1          | 01      | 000111       |
| T1   | T1         | 3       | 1          | 100     | 110000       |
| T2   | T2         | 3       | 1          | 010     | 001100       |
| T3   | T3         | 3       | 1          | 001     | 000011       |

### 18.3.1 Adding Schedule Terms to the Reference Table

To add schedule terms to the reference table, go to the Build View > Global > Reference > Schedule Term Codes > Codes > Options > Add. Enter a code that will be meaningful to the users and Save.

| Code | Description | Local |
|------|-------------|-------|
| T1   |             |       |
| T2   |             |       |
| T3   |             |       |

### 18.3.2 Adding and Defining Schedule Terms

1. To add additional schedule terms go to Scenario > Terms > Options > Add.
2. From the **Code** drop down list select the desired schedule term. If the term code representing the required schedule term does not appear, add the code into the reference table as described above.

Pages Scenario Workspace Courses Student Staff Rooms Rules Global

Scenarios :: 1.3 Test 5.6 DB :: S1

Details Options Reports Help

Preferences Save Cancel

Terms Details

Days

Periods

Rotations

Bell Schedules

Code S1

Name Semester 1

Base terms per year 2 Set

Term map   Set date

Save Cancel

3. Use the following table to enter information in the fields:

| Field                      | Description   |
|----------------------------|---|
| <b>Code</b>                | Select the code for the schedule term. For example, you might select FY for a full-year term, and S1 for Semester 1.<br><b>Note:</b> School users with the security role of Schedule Builder can create these schedule term codes from the Build View > Global > Reference > Schedule Term Codes > Codes > Options > Add  |
| <b>Name</b>                | Type a name for the schedule term.  |
| <b>Base terms per year</b> | Type the total number of this type of schedule term in your schedule. For example, for a course that meets one-third of the year (a single trimester), there are three base terms. For a course that meets half of the year (a single semester), there are two base terms.  |
| <b>Term map</b>            | Select the checkbox that represents which of the base terms this specific schedule term covers. For example, if you are defining Semester 1 and there are two base terms, select the first checkbox to indicate that this term is the first of the two terms.<br><b>Note:</b> The system displays checkboxes that equal the number of base terms you identify at the Base terms per year field. For example, if you identify 3 base terms, three checkboxes appear. |

| Field                       | Description   |
|-----------------------------|---|
| <b>Term date ranges</b>     | Type or click to select the start and end dates of this schedule term. The system validates these dates against the <b>school year dates</b> . For example, you cannot enter a start date that is before the first day of the school year.<br>For the functionality of <i>Update Designation/ELL Tallies</i> , to accurately determine student program participation (ELL) Term start and end dates need to be added. |
| <b>Grade term cover map</b> | Entered in the School view, after schedule has been Committed.  |

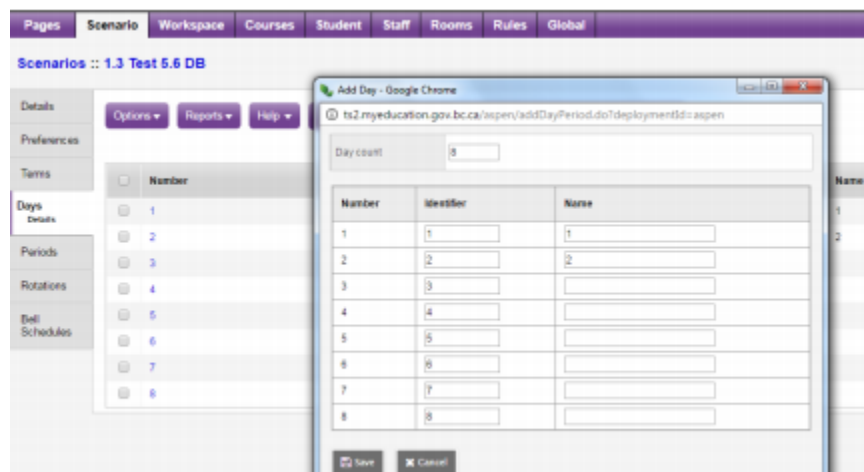
- If schedule terms exist that are not required, these can be deleted by clicking into the details of the schedule term and going to Options > Delete.

## 18.4 Days

Your schedule might consist of several days per schedule cycle. This way, students can attend different classes on different days in a schedule. Many schools follow a flat, two day schedule where full year courses are offered on a day 1 or day 2 while the semester courses are offered on both. Schools that offer back to back or double blocks of courses where attendance is taken in both blocks will require a rotated schedule. In order to accommodate the full rotation schools may have multiple days. For example, a school that has eight rotations for their cycle to complete would need eight days for their rotated schedule.

### 18.4.1 To Add schedule days:

- Log on to the Build view.
- Click the Scenario tab.
- Select the scenario you want to work with, and click the Days side-tab.
- On the Options menu, click Add. The Add Day dialog box appears:



5. In the Day count field, type the number of days in the schedule scenario. For example, if you are adding another day to a list of existing days, increase the number by one. The dialog box displays the appropriate number of rows, with each row representing one day.

6. For each day, type an identifier in the Identifier column.

**Note:** It is suggested using different identifiers for days and periods. For example, if you use letters for periods, use numbers for days.

7. Type a name for each day in the Name column.

8. Click Save.

#### 18.4.2 To Delete schedule days:

If you rotated your schedule last year, you will want to DELETE the days that were added to accommodate your Rotation and reset the number of days, to what you schedule with. In the example below, this school rotates out the schedule to 8 Days, but schedules with 2 Days. Therefore, prior to starting scheduling, the number of Days needs to be adjusted back to 2.

1. Select the scenario you want to work with, and click the Days side-tab.

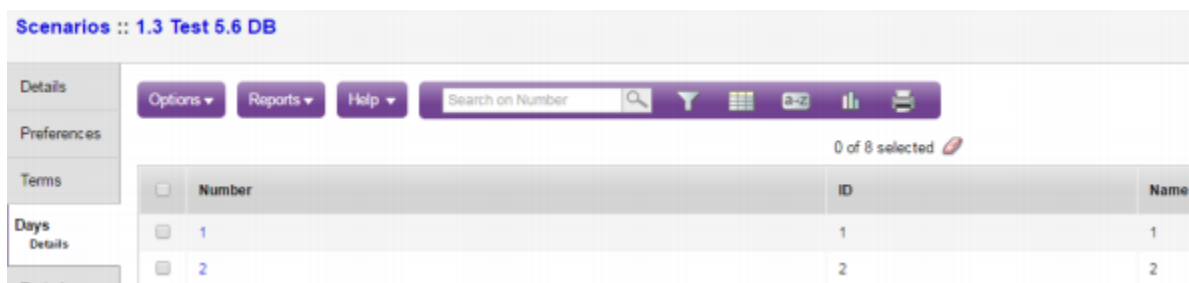
2. On the Options menu, click Add. The Add Day dialog box appears.

3. In the Day count field, type the number of days in the schedule scenario.

4. For each day, type an identifier in the Identifier column. Note: It is suggested using different identifiers for days and periods. For example, if you use letters for periods, use numbers for days.

5. Type a name for each day in the Name column.

6. Click Save.



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|                          | Number | ID | Name |
|--------------------------|--------|----|------|
| <input type="checkbox"/> | 1      | 1  | 1    |
| <input type="checkbox"/> | 2      | 2  | 2    |

#### 18.4.3 Periods

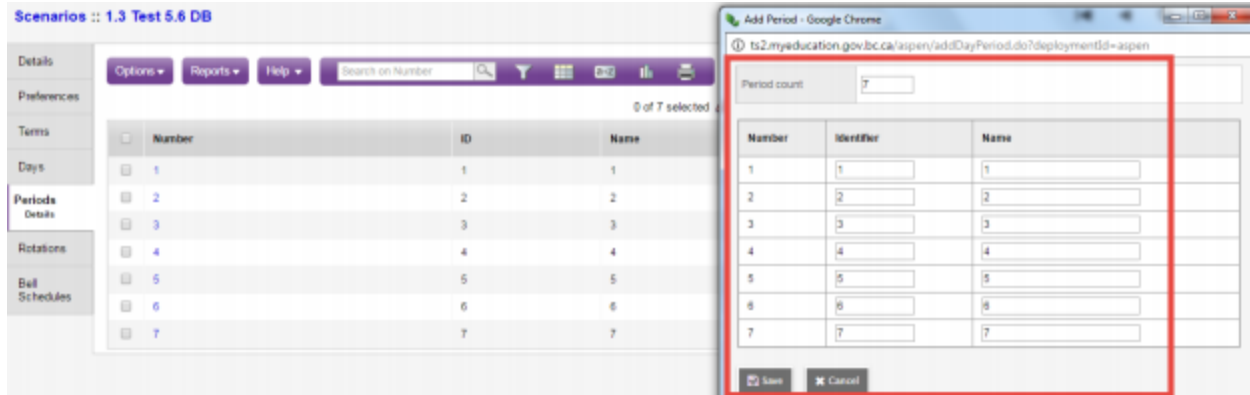
Define the number of periods in your schedule. To define your periods:

1. Log on to the Build view.

2. Click the Scenario tab.

3. Click the Periods side-tab.

4. On the Options menu, click Add. The Add Period dialog box appears:



5. In the Period count field, type the number of periods in this schedule scenario. The dialog box displays the appropriate number of rows, with each row representing a period.
6. For each period, type an identifier in the Identifier column.
7. For each period, type a name in the Name column.
8. Click Save.

#### 18.4.4 Bell Schedules

During the 'prepare to build' schedule process, you might want to define your school's bell schedules.

**Note:** If your school uses more than one bell schedule during the same schedule day, you need to define bell schedules before you build. Otherwise, you can wait to define your bell schedules in the School view, after you commit your schedule.

When you define your bell schedules, you define the start time and duration for each schedule period in your school. Then, when you validate your 'prepare to build' data, the schedule engine checks for any conflicts arising from the bell schedules. Not all schools need to define bell schedules.

You need to define bell schedules for one or more of the following reasons:

1. Your school has periods that overlap. For example, some schools have lunch spanning three periods – 4, 5, and 6. You need to define the times of these periods to determine if and when there is a schedule conflict.
2. Some schools have shorter periods in the afternoon (20 minutes) than in the morning (40 minutes). You need to define bell schedules to determine schedule conflicts for students.
3. Grades in the same school might have different schedule shapes. For example, 5th, 6th, 7th graders might operate with a 2-day/6-period schedule, and grades 8-12 might operate with a 2-day/4-period schedule. Because you can only define one schedule shape per school, you can use bell schedules to differentiate between the two schedules. If you create more than one bell schedule for your school, you must use Bell Schedule rules to assign the appropriate bell schedules to rooms and courses.

**Note:** If you want the build schedule engine to reference bell schedules when building the master schedule, select the Include in scheduling checkbox when defining bell schedules.

**Note:** To copy bell schedules from a previous year, on the Options menu, click Copy From.

**To define bell schedules:**

1. Log on to the School view.
2. Click the Schedule tab.
3. Click the Structure side-tab, then click Bell Schedules.
4. On the Options menu, click Add. The New Schedule Bell page appears:

| Bell period number | Bell period identifier | Period name | Start time | Duration (Minutes) |
|--------------------|------------------------|-------------|------------|--------------------|
| 1                  | 1                      | 1           | 8:20 AM    | 80                 |
| 2                  | 2                      | 2           | 9:25 AM    | 85                 |
| 3                  | 3                      | 3           | 10:40 AM   | 80                 |
| 4                  | 4                      | 4           | 11:45 AM   | 64                 |

5. Type a unique identifier, name, and description for the bell schedule.
6. Select the Include in scheduling? checkbox if you want the build engine to use this bell schedule to schedule sections to avoid conflicts.
7. In the Number of days field, type the number of days in this bell schedule.
8. At the Combine day's field, to select multiple days that can feed to the particular bell schedule day. This allows different days' schedules to appear on one day on the fly without modifying the actual schedule.
9. For each period, define the start time and duration.

**Note:** The start time for each period does not have to be sequential like the period number order. This way, you can change the order of periods on the fly for a particular day without modifying the actual schedule.

## 19.0 School Business Cycle Processes Chart

See the following two pages:



## School Business Cycle Processes

| Business Event   | Elementary | Middle | Secondary |
|--|------------|--------|-----------|
| <b>Mid-August to First Day of School</b>   |            |        |           |
| August Provincial Exams ( Mid August)  | No         | No     | Yes       |
| Register new students  | Yes        | Yes    | Yes       |
| Check MOE website for new Graduation Handbook of Procedures & Course Registry                          | No         | No     | Yes       |
| Check MOE secure school website for Non-Grad students  | No         | No     | Yes       |
| Follow up with any manual submission of mark changes to ensure grad status for students is appropriate | No         | No     | Yes       |
| Complete all tasks on the School Start-up Checklist sent out by Software Support                       | Yes        | Yes    | Yes       |
| <b>September</b>   |            |        |           |
| Admission/registration of new students is on-going   | Yes        | Yes    | Yes       |
| Ensure all students are active and assigned a Standard Calendar  | Yes        | Yes    | Yes       |
| 1701 Submission  | Yes        | Yes    | Yes       |
| <b>October</b>   |            |        |           |
| Class Size Verification  | Yes        | Yes    | Yes       |
| SADE Submission  | No         | Yes    | Yes       |
| TRAX Submission  | No         | No     | Yes       |
| Double check set-up in preparation of first report card  | Yes        | Yes    | Yes       |
| <b>November</b>  |            |        |           |
| First Reporting Period (Nov/Dec)   | Yes        | Yes    | Yes       |
| Exam register posted on MOE School Secure web for January exam write dates                             | No         | No     | Yes       |
| <b>December</b>  |            |        |           |
| First Reporting Period (Nov/Dec)   | Yes        | Yes    | Yes       |
| TVRs and Non-Grad reports posted on MOE School Secure Web  | No         | No     | Yes       |
| January Provincial Exam Registration Deadline  | No         | No     | Yes       |
| Next Year Schedule - Timetable Building Starts   | Yes        | Yes    | Yes       |
| <b>January</b>   |            |        |           |
| Change from Semester 1 to Semester 2 - increase in new student admissions & course changes             | No         | No     | Yes       |
| Second Report Card Period  | No         | No     | Yes       |
| SADE Submission  | No         | Yes    | Yes       |
| Provincial Exams   | No         | No     | Yes       |
| Pre-transition Students for Next Year Scheduling   | Yes        | Yes    | Yes       |

| <b>Business Event</b>  | <b>Elementary</b> | <b>Middle</b> | <b>Secondary</b> |
|--|-------------------|---------------|------------------|
| <b>February</b>  |                   |               |                  |
| Next Year Registration begins  | Yes               | Yes           | Yes              |
| 1701 Submission  | Yes               | Yes           | Yes              |
| TRAX Submission  | No                | No            | Yes              |
| Course changes for Semester 2  | No                | No            | Yes              |
| Pre-transition Students for Next Year Scheduling   | Yes               | Yes           | Yes              |
| Pre-Scheduling/Student Course Selections   | No                | Yes           | Yes              |
| Enrollment Projections for Next Year   | Yes               | Yes           | Yes              |
| <b>March</b>   |                   |               |                  |
| January exam marks released  | No                | No            | Yes              |
| Second Report Cards  | Yes               | Yes           | No               |
| Run BC TRAX Error Upload report for unsuccessful exam mark loads, enter manually if required | No                | No            | Yes              |
| <b>April</b>   |                   |               |                  |
| Third Report card Period   | No                | No            | Yes              |
| SADE submission  | No                | Yes           | Yes              |
| TRAX Submission  | No                | No            | Yes              |
| <b>May</b>   |                   |               |                  |
| Exam register posted on MOE School Secure web for June Exam write dates                      | No                | No            | Yes              |
| TVRs and Non-Grad reports posted on MOE School Secure web                                    | No                | No            | Yes              |
| Registration deadline for June exams   | No                | No            | Yes              |
| Next Year Scheduling Activities  | Yes               | No            | No               |
| Interim transcript data available to BC PSIs   | No                | No            | Yes              |
| 1701 for CE and DL Schools   | *Yes              | *Yes          | *Yes             |
| <b>June</b>  |                   |               |                  |
| Final report Cards   | Yes               | Yes           | Yes              |
| Provincial Exams   | No                | No            | Yes              |
| Final TRAX submissions   | No                | No            | Yes              |
| Complete EOYR Checklist sent by Software Support (end of year)                               | Yes               | Yes           | Yes              |
| <b>July</b>  |                   |               |                  |
| SADE Submission  | No                | Yes           | Yes              |
| Transcripts & Dogwoods sent to graduated students & schools                                  | No                | No            | Yes              |
| Manual submission of any marks for courses completed after June TRAX submission              | No                | No            | Yes              |
| All Next Year timetable activities must be completed prior to EOYR                           | Yes               | Yes           | Yes              |