



Managing Student Information

User Guide
Version 5.2



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Version 5.2

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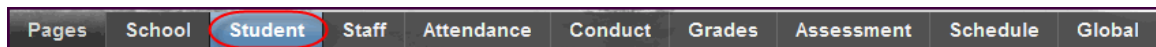
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Managing Student Information



Use the **Student** tab to access the Student List for either your district, intermediate organization or school, depending on which view you are logged on to or what you have access to. The Student List is your online filing cabinet full of student records, containing a folder for all of your active and inactive students. Access all of a student's information — such as demographics, contacts, conduct, attendance, enrollment, and schedule — from the Student List.

Note: The Student List initially contains active students only. To include inactive students, on the Student List page, use the **Filter** menu  to select **All Records**. To return to listing active students only, use the **Filter** menu to select **Active Students**.

You can determine the information you view for each student on the list, and if you want to view a group of students with something in common only, such as a year of graduation.

To use the **Student** tab, familiarize yourself with the basic navigation and student selection process. Then you can use the side-tabs to enter, edit, or view information for a specific student.

Understanding the Student List







The Student List contains a list of all of the students in your school. Familiarize yourself with the basic navigation and student selection processes. You can do the following:





- [Use the Student List.](#)
- [Filter students on the Student List.](#)
- [Find and select a student by name.](#)
- [Use the Reports menu.](#)

Using the Student List

The **Student List** displays a list of the active students in your school or district, depending on which view you log on to:

Use the following table to navigate the **Student List**:

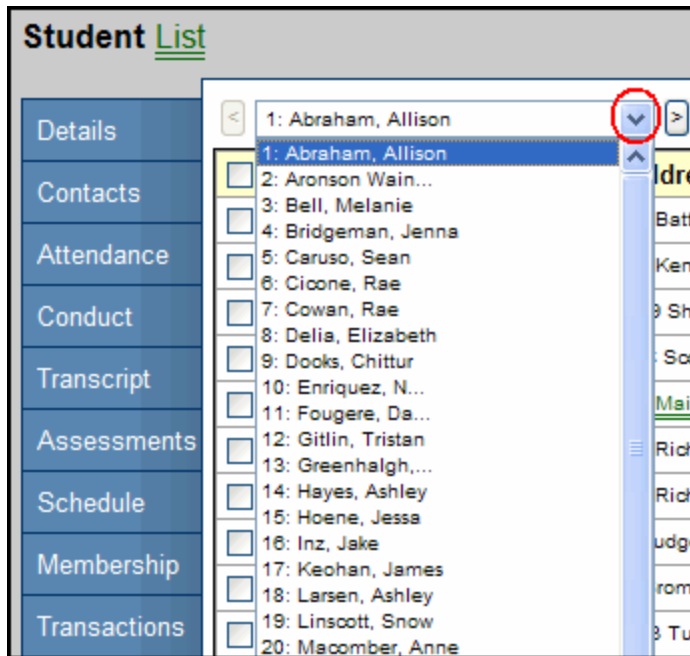
Use this section of the Student List	To
<p>Options, Reports, and Help menus</p> 	<p>Perform functions or print reports. You can also access Aspen online help.</p>
<p>Side-tabs to the left of the page</p> 	<p>Enter, edit, or view information for the student you select.</p>
<p>Page control</p> 	<p>Navigate through the pages of students in the list.</p> <p>In addition to displaying the page control at the top of all list pages, you can set your user preferences to display it at the bottom of all list pages.</p>
<p>Record counter</p> 	<p>View the number of records you selected in the list. Click  to clear the checkboxes of all selected records.</p>
<p>Record navigation bar</p> 	<p>Browse through the list of students without having to return to the Student List to access each record individually.</p>
<p>Filter menu icon</p>	<p>Determine the group of records that appear on the page, such as All Active Students.</p>

Use this section of the Student List	To
	
Field Set menu icon 	Select the columns of information you want to view for each student in the list.
Sort Order menu icon 	Determine how you want the records on the page sorted, such as by name or homeroom.
Dictionary menu icon 	On lists that use extended Data Dictionaries, select which one you want to use. <div style="background-color: #e1eef6; padding: 5px;"> <p>Note: This icon only appears on the Transcript and IEP pages.</p> </div>

Navigate the Student List

The Student List sorts students alphabetically by last name, by page, similar to a phonebook or dictionary. At the top of the Student List, the first student on the current page appears in the page control drop-down:

Click the drop-down to view the students who begin each page of the Student List:



If you click a name in the drop-down, the system displays a new page with that student as the first record. For example, from the above screenshot, selecting '14. Hayes, Ashley' opens the following page:

Student <u>List</u>					
<input type="text" value="14: Hayes, Ashley"/> 0 of 763 selected 					
<input type="checkbox"/>	Name	Address	YOG	DOB	EnrStatus
<input type="checkbox"/>	Hayes, Ashley	464 B Idenson Grove	2010	1/21/1992	Active
<input type="checkbox"/>	Hayes, Daniel	976 Fairmount street	2012	11/5/1993	Active
<input type="checkbox"/>	Hayes, Howard	9 Green Needles Pl	2009	1/26/1991	Active
<input type="checkbox"/>	Hayes, Michael	18 Prescott Sreet	2009	4/4/1991	Active
<input type="checkbox"/>	Hayes, Sinclair	34 Boston Post D	2010	4/9/1992	Active
<input type="checkbox"/>	Hedkman, Amanda	677 South road	2010	3/28/1992	Active
<input type="checkbox"/>	Hegarty, None	16 Sweeney Rad	2012	1/30/1994	Active
<input type="checkbox"/>	Hegarty, Rebecca	839 Kelly Street	2009	6/26/1991	Active
<input type="checkbox"/>	Hennessey, Elizabeth	78 Cinnamon Ct	2009	4/6/1992	Active
<input type="checkbox"/>	Hennessey, Elliot	42 Fern Highway	2011	10/10/1993	Active
<input type="checkbox"/>	Henry, Patricia	72 Old <u>Stage</u> Coach Ct.	2011	5/10/1993	Active
<input type="checkbox"/>	Hernandez, Briana	225 Old Colony Sreet	2012	6/21/1995	Active
<input type="checkbox"/>	Hernandez, Kayla	16 Rutland A3	2011	6/27/1993	Active

To view students on the previous page, click Previous . To view students on the next page, click Next .

You can customize the number of records, or [rows](#), that you want to view per page and the information, or field sets, that appear for the students.

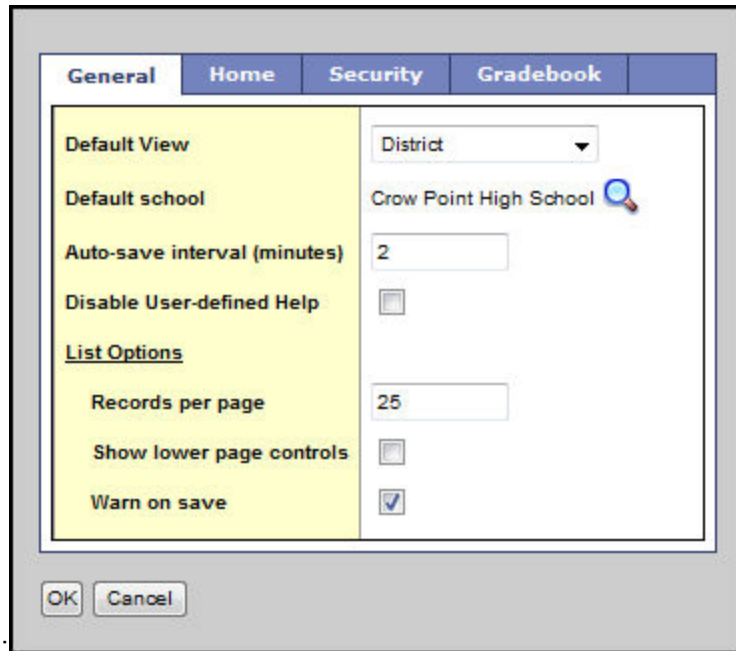
In addition to displaying the page control at the top of all list pages, you can set your user preferences to display it at the bottom of all list pages.

Set the Number of Rows on a List Page

To determine the number of rows that appear on a list page, set the records per page in your preferences.

Do the following to determine the number of rows on each list page:

1. On the settings bar, click **Set Preferences**. The Set Preferences dialog box appears




2. In the **Records per page** field, type the number of records, or rows, you want to view on any page in the system that appears as a list. The number you enter here, along with the font size for your Web browser and your computer's desktop resolution, determine if you will need to scroll on list pages or if you can view all records on a page at once.
3. Click **OK**.

Use Field Sets

Throughout Aspen, you can use field sets to customize the columns that appear in a list. When you create field sets, you define the columns of information you want to see for every record on the page.

Note: Display the 'Alerts' column in your field sets for even quicker access to student alert content.

Manage your field sets in the right-hand corner of each page using the **Field Set** menu icon :

The screenshot shows the 'Student List' interface. At the top, there are navigation tabs: Pages, School, Student, Staff, Attendance, Conduct, Grades, Assessment, Schedule, Global, and Admin. Below these are sub-tabs: Options, Reports, and Help. A search bar contains '1: Abety, Emily' and a filter icon. A dropdown menu titled 'Manage Field Sets...' is open, showing options: Default Fields (checked), Addresses, SPED Fields, GPA, Locker Information, Next Year fields, Civil Rights Data Collection, Calendar Info, Groups, and School Info. The main table displays student information with columns: Name, SASID, LASID, H1N1, EnrStatus, Grade, Homeroom, and HR Teacher. The table shows 10 rows of student data. At the bottom, there are navigation arrows and a search bar with '1: Abety, Emily'.

Name	SASID	LASID	H1N1	EnrStatus	Grade	Homeroom	HR Teacher
Abety, Emily	1247732110	238847	N	Active	08	LGI	
Ackerman, James	1345564589	292479	N	Active	11	D101	Hartwell, A
Adam, Monique	1302499311	206544	N	Active	11	E207	Deang, C
Adams, Tyler	1652226004	297230	N	Active	12	D105	Baker, A
Aldoriso, Mingle	1172891282	232039	N	Active	10	D103	Baum, H
Allen, Diana	1129254645	208672	N	Active	09	E107	Sjolie, E
Alper, Heather	1062556430	248235	N	Active	11	E101	Weisz, J
Amico, Elaine	1304051381	244040	N	Active	12	B205	Ambrose, A
Amico, Joseph	1215480988	205314	N	Active	11	A101	Medwar, D
Amico, Timothy	1062645502	241387	N	Active	09	E201	Brandy, H
Anderson, Isabella	1260305854	283490	N	Active	09	B105	Bowers, J
Anderson, Lee	1208266082	250587	N	Active	10	D104	Holland, K
Anderson, Margaret	1395487850	236301	N	Active	11	D201	Liu, K
Anderson, Rose	1188397751	255264	N	Active	12	D201	Liu, K
Anderson, Taylor	1038939046	231707	N	Active	10	A204	Barr, D

From this area of the page, you can do the following:

- Create a field set.
- Modify an existing field set.
- Copy a field set.
- Delete a field set.

Filtering Students on the Student List

At times, it is not necessary for your Student List to contain every record in Aspen. Sometimes, you might need to select and work with only active students or students with a specific year of graduation. Aspen contains numerous [methods for filtering the students you see](#) on your Student List, including the following:

- [Viewing active students only](#)
- [Viewing secondary students only](#)
- [Using queries](#)
- [Using snapshots](#)
- Viewing custom selections (A custom selection is a group of students you specifically select and are currently viewing).

View Active Students Only

By default, Aspen displays active students only on your Student List. You might look at a snapshot or use a query to find a specific group of students and then want to return to viewing only active students.

To view active students only:

1. On the Student List, use the **Filter** menu  to select **Active Students**:

Managing Student Information

The screenshot shows the 'Student List' interface. At the top, there are tabs for Pages, School, Student, Staff, Attendance, Conduct, Grades, Assessment, Schedule, Global, and Admin. Below these are sub-tabs for Options, Reports, and Help. A search bar contains '1: Abety, Emily' and a filter icon. A dropdown menu is open, showing filter options: All Active Students (checked), Primary Active Students, All Students, Former Students, Next Year Students, AM Bus = ?, Grade = ?, Guidance Counselor = ?, Students taking ?, Active SPED Students, and 1 student per Phone, Address. The table below has columns: Name, SASID, LASID, H1N1, EnrStatus, Grade, Homeroom, HR Tead, and email. The first row is Abety, Emily. The table shows 0 of 764 selected.

Name	SASID	LASID	H1N1	EnrStatus	Grade	Homeroom	HR Tead	
Abety, Emily	1247732110	238847	N	Active	08	LGI		
Ackerman, James	1345564569	293479	N	Active	11	D101	Hartwell	
Adam, Monique	1302499311	206544	N	Active	11	E207	Deang,	
Adams, Tyler	1652226004	297230	N	Active	12	D105	Baker, A	
Aldoriso, Mingle	1172991282	232039	N	Active	10	D103	Baum, H	
Allen, Diana	1129254645	209672	N	Active	09	E107	Sjolie, E	12/26/1993 dallen@aol.com
Alper, Heather	1062656430	248235	N	Active	11	E101	Weisz, J	11/15/1993 halper@blueyonder.com
Amico, Elaine	1304051361	244040	N	Active	12	B205	Ambrose, A	6/20/1991 epilla@hotmail.com
Amico, Joseph	1215480988	205314	N	Active	11	A101	Medwar, D	1/2/1993 jamico@eudora.com
Amico, Timothy	1062645502	241387	N	Active	09	E201	Brandy, H	1/14/1995 tamico@eudora.com
Anderson, Isabella	1260305854	283490	N	Active	09	B105	Bowers, J	5/12/1995 ipost@earthlink.com
Anderson, Lee	1208260602	260687	N	Active	10	D104	Holland, K	2/24/1994 lvenkatesh@earthlink.com
Anderson, Margaret	1395487850	236301	N	Active	11	D201	Liu, K	6/20/1992 manderson@comcast.com

The system refreshes your Student List to display all active students in your school or district, depending on which view you log on to.


View Secondary Students Only

During the school year, students in a particular school might transfer to another school within your district. When a student transfers, the system moves his or her record to the new school. That record becomes a secondary student record in the original school.

For example, assume a student transfers from West Elementary to East Elementary in November. Her record appears in East Elementary on active student lists and in West Elementary on secondary student lists.

Note: Secondary student records appear at the school a student transfers out of only during the school year the transfer occurs.

To view secondary students:

1. Log on to the School view.
2. Click the **Student** tab.
3. Use the **Filter** menu  to select **All Secondary Students**. The Student List displays only students who transferred from your school to another school in your district during the current school year.

Note: If you select **All Students** from the **Filter** menu, the system displays active students, inactive students such as transfers and withdrawals, and secondary students.

Using Queries to Find a Group of Records

A query represents a dynamic filter. It helps you search for and filter a group of records that matches specific criteria at a particular time.

For example, you can perform a general search for a group of students with the same year of graduation, or a more specific search for students in the same graduating class in a particular homeroom.

You can also save queries you use often. Or, you can copy queries to use as a shell to create a new query for yourself, or share queries with other users, your school, or your district.

There are three modes of queries:

- **Simple Mode:** These queries search for records based on the system's lists of tables, fields, and operators.

For example, create a Simple query to search for all students graduating in 2012 who are in homeroom 100. After you save this query and run it again, it will always return a list of students graduating in 2012 who are in homeroom 100. Saved Simple queries always search for records based on the same criteria.

- **Advanced Mode:** These queries also search for records based on the system's lists of tables, fields, and operators, but have added functionality. When you use a saved Advanced query, you have the option of changing the search criteria before it completes the search.

For example, create an Advanced query to search for all students graduating in 2012 who are in homeroom 100. After you save this query and run it again, you can change some or all of the search criteria. You can search for students graduating in 2012 who are in homeroom 150. Saved Advanced queries can be changed to search for records based on different criteria than the criteria they were originally created for.

- **Direct SQL Mode:** These powerful queries search for records based on your own self-defined criteria, not the system's tables, fields, and operators. You use SQL syntax to define the criteria; therefore, you are not limited by interface restrictions.

For example, create a Direct SQL query to search for all students who have more than one absence this year.

In Simple and Advanced modes, you can also create parenthesized queries to manage and group complex search conditions. Parentheses allow you to group criteria, resulting in a more powerful search tool.

With a parenthesized query, a single search produces results that would require multiple queries using the basic method. For example, you can search for records that meet the following conditions:

- all females who are in homeroom 287; **or**
- all females who are in homeroom 360; **and**
- whose graduation year is 2010; **or**
- whose graduation year is 2011.

Find Students Enrolled in Class Taught by a Specified Teacher

To create an advanced query to search for all students enrolled in a class taught by a specific teacher:

Note: This advanced query will only work within the Student List. After running the query, you will be able to create a snapshot of the results for use with various reports like report cards and the official school transcript.

1. Go to the School view.
2. Click the **Student** tab.
3. From the **Options** menu, click **Query**.
4. At the top of the Query dialog, click **Advanced Mode**.
5. Under **SELECT * FROM STUDENT**, copy and paste the following:

```
WHERE STD_OID IN (  
    SELECT TRN_STD_OID  
    FROM STUDENT_TRANSCRIPT  
    WHERE TRN_MST_OID IN (  
    SELECT MST_OID  
    FROM SCHEDULE_MASTER  
    WHERE MST_SCH_OID = '[SCH_OID]'  
    AND MST_STF_OID_PRIMARY = '[STF_OID]'  
    )  
    )
```

6. Replace the `[SCH_OID]` value in the query as follows:
 - Go to the School view, click the **School** tab and then the **Schedules** side-tab.
 - Hover over the desired school year, such as **2010-2011** (or right-click and select **Properties** or **Copy Link Location**).
 - The following line appears in the browser's status bar at the bottom of the window (or in the **Properties** pop-up or in your clipboard if you've copied it):

```
javascript:doParamSubmit(2100, document.form['contextListForm'],  
'SCH000000i0116')
```

7. Replace the `[STF_OID]` value in the query as follows:
 - Go to the School view and click the **Staff** tab.

- Hover over the desired staff name, such as **Petullo, Anna** (or right-click and select **Properties** or **Copy Link Location**). The following line appears in the browser's status bar at the bottom of the window (or in the **Properties** pop-up or in your clipboard if you've copied it):

```
javascript:doParamSubmit(2100, document.form['contextListForm'],  
'STF0000000004e')
```

8. Click **Search**. The results of your query appear.

Using Snapshots to Create and Store Groups

A snapshot represents a static filter. Think of a snapshot as a picture of a particular group of students, staff members, courses, or rooms that you can file and easily retrieve.

For example, assume you manage the Math club and want to be able to quickly access all of the students who are members. You can use a query to find the students initially, and then create a snapshot of these students. This way, each time you want to work with students in the Math club, you need only refer to your snapshot.

To create a snapshot:

1. Do one of the following:
2. Search for or select the records you want to include in your snapshot. You might select these records individually, or use a query to find them.

Note: Be sure to select the checkbox next to each record you want to include in your snapshot, click the **Options** menu, then click **Show Selected**.


3. On the **Options** menu, click **Snapshots**.
4. In the Manage Snapshots dialog box, click **New**. The Snapshot Definition dialog box appears:

The screenshot shows a form with the following fields and options:

- Name:** Math Club
- Owner:** Aspen Public Schools
- Save as filter:**
- Move to top of my list:**
- Records to Include:**
 - Current List
 - Snapshot Combination
- Below 'Snapshot Combination' are three dropdown menus:
 - Math Club
 - Union
 - Math Club
- Buttons: Save, Cancel

5. Type a name for this snapshot.
6. Click the **Owner** drop-down to select the user, school, intermediate organization, or district as the owner. This determines which other users, if any, can use this snapshot.

Note: Not all users have privileges for all levels of ownership.

7. If you would like to make this snapshot an option on your **Filter** menu , select the **Save as filter** checkbox.
8. If you would like this snapshot to be your default filter (for example, whenever you open the Student List, these are the records you'd like to see), select the **Move to top of my list** checkbox.
9. In the **Records to Include** box, select one of the following:
 - Current List to include only those records you selected checkboxes for on the list page.
 - Snapshot Combination to combine two existing snapshots. (This option is only available if you have already defined at least two snapshots.)
10. If you selected **Snapshot Combination**, use the following table to determine how you want to assemble the two snapshots you select:

Select	To include the following in the snapshot:
Union	Any records that appear in the first snapshot you select or the second snapshot you select. For example, if you want to create a snapshot of students who appear on either or both the first term and second term honor roll, select Union .
Intersect	Only records that appear in both the first and second snapshot you select. For example, if you want to create a snapshot of students who appear on both the first and second term honor rolls, select Intersect .
Difference	Any record that appears in the first snapshot you select, but not in the second. For example, if you want to create a snapshot of students who appear on the first term honor roll, but not on the second term honor roll, select Difference .

11. Click **Save**. The Manage Snapshots dialog box displays the snapshot you created.
12. Select the snapshot you created, and click **Use**. The list page displays the records in the snapshot selected.

Note: You can also save a snapshot to the **Filter** menu on a list page. Then, you can quickly select that snapshot.

Manage Snapshots for Individual Records

You can manage the snapshots a specific student, staff member, room, or course is a member of. For example, assume you create a snapshot of all students on the Volleyball team at the beginning of the season. Then, a student joins the team. Select that student and add him or her to the snapshot.

To manage snapshot membership for an individual record:

- To manage student snapshots, click the **Student** tab.
 - To manage staff snapshots, click the **Staff** tab.
2. Search for and select the specific record.
3. Click the **Snapshots** side-tab. A list of snapshots the student, staff member, course, or room belongs to appears.
4. Do one of the following:
 - To add the record to a snapshot, on the **Options** menu, click **Add**. The Snapshot Pick List appears. Select the snapshot and click **OK**.
 - To delete a record from a snapshot, select the checkbox next to the record. On the **Options** menu, click **Delete**.

Understanding Queries, Snapshots, and Filters

Queries, snapshots, and filters are ways to filter any list, such as the Student List or the Staff List.

Query


A query is a dynamic filter. Use a query to search for a group of records one time. If you use the same query criteria again, it might not produce the same list of records. For example, you can use a query to search for all ninth-graders who have a GPA equal to or higher than 3.0. Because a student's GPA can change with each grade term, the group of students that the query gathers could be different each time you use it.

Snapshot

A snapshot represents a static filter. Use a snapshot to take a picture of a group of records you will need to access regularly, or need to save. For example, assume you want to save the group of students the query above finds to determine your Quarter 1 Honor Roll. Once you create the snapshot — think of a picture taken with a camera — the group of students in the snapshot never changes.


Therefore, if you create a snapshot of students in your homeroom today, and a new student registers tomorrow, your snapshot does not contain that new student. But you can modify a snapshot manually.

Filters

There are default filters and custom filters. Default filters are available from every list page. You can also create your own filters when you make a snapshot or query. You have the option of saving a snapshot and a query as a filter so you can use it again. You will be able to easily access the filter by clicking  and selecting the filter you created to view the list of records.

Finding and Selecting a Student by Name

If you know a student's name, there are three ways to find that student on the Student List. You can do one of the following:

- Use the Find dialog box (**CTRL+F**).
- Use the **Page** drop-down .
- Press **CTRL+I** to search for a student by initials.

Use Control+F

1. To quickly access a specific student's record on the Student List:
2. Press **CTRL+F**.

In the Find dialog box, type one of the following:

- Student's last name
 - Student's full name (last name, first name)
3. Click **OK** or press **ENTER**.

The Student List displays the page containing the selected record and selects the first student matching that value — or the closest match, if an exact match cannot be found.

Using **CTRL+F** multiple times will select multiple records.

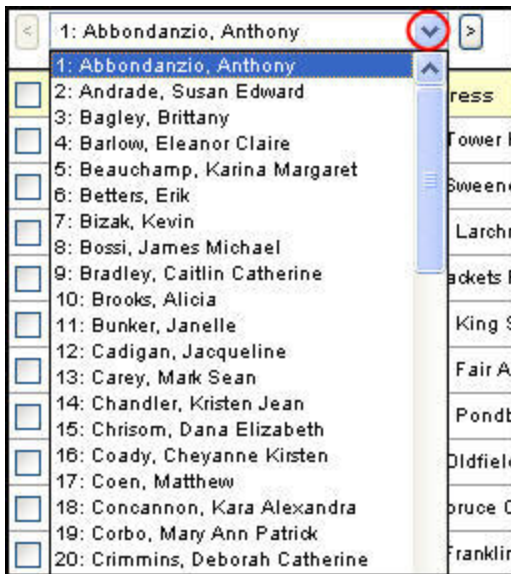
CTRL+F is based on the current sort order of the list. If the list is sorted by YOG rather than name, then you would type a value such as **2012** in the Find dialog box.



Use the Page Control

At the top of the Student List, the first student on the current page appears in a drop-down list in the page control. Use this list to quickly view the students included on the current page.

In addition to displaying the page control at the top of all list pages, you can set your user preferences to display it at the bottom of all list pages.

If you click a student's name on the drop-down, the system displays a new page with that student as the first record:



Note: Your district sets the maximum number of pages that appear in the page control. For example, if your district determines to show only 100 pages per list, you would click **Next**  to view the next 100 pages. To view students on the previous page, click **Previous** .

Search by Initials and Beginning of Names

On list pages, such as the Student List, you can search for students by initials and beginning of names.

To search for values by initials or beginnings of values, press **CTRL+I**. A prompt appears. For example, to search for a student, you might do the following:

1. Type the student's first initial, or the first few letters of the student's first name.

Note: Be sure to add a space between each initial.

Managing Student Information

2. Type the student's middle initial, if you know it. If you do not know the student's middle initial, type the student's last initial, or the first few letters of the student's last name.

Note: If you type only one letter, the system displays all students whose last name begins with that letter.

3. Press **ENTER**, or click **OK**. The system displays a list of students who match the initials search you created.

Selecting Students on the List

Before you can view information or perform functions for students on the Student List, you need to select the student or students you want to work with.

Select a Student to View, Enter, or Edit Information

To view information on a side-tab for an individual student on the list:

1. Click the **Student** tab.
2. On the Student list, select the checkbox next to the appropriate student's name.
3. Click a side-tab to enter, edit, or view information for that student.

Select a Student to Perform Functions or Print Reports

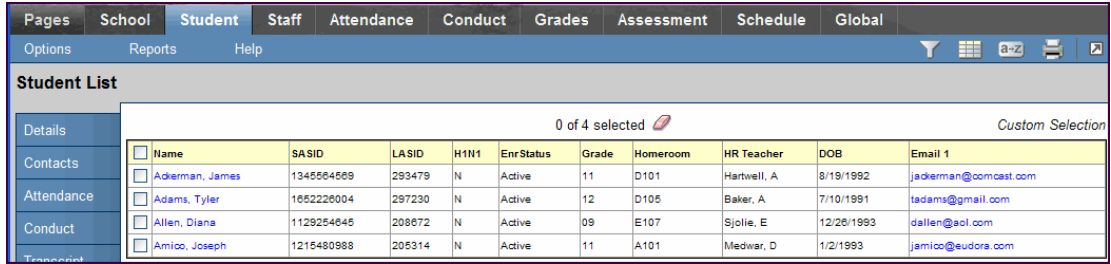
To use the Options or Reports menus to perform functions or print reports for a student or group of students:

1. Click the **Student** tab.
2. On the Student List, select the checkboxes next to the appropriate students' names:

Name	SASID	LASID	H1N1	EnrStatus	Grade	Homeroom	HR Teacher	DOB	Email 1
<input type="checkbox"/> Abety, Emily	1247732110	238847	N	Active	08	LGI		10/24/1995	eaabety@aol.com
<input checked="" type="checkbox"/> Ackerman, James	1345564569	293479	N	Active	11	D101	Hartwell, A	8/19/1992	jackerman@comcast.com
<input type="checkbox"/> Adam, Monique	1302499311	208544	N	Active	11	E207	Deang, C	1/20/1993	madam@blueyonder.com
<input checked="" type="checkbox"/> Adams, Tyler	1652226004	297230	N	Active	12	D105	Baker, A	7/10/1991	tadams@gmail.com
<input type="checkbox"/> Aldoriso, Mingle	1172991292	232039	N	Active	10	D103	Baum, H	11/13/1993	maldoriso@eudora.com
<input checked="" type="checkbox"/> Allen, Diana	1129254645	208672	N	Active	09	E107	Sjolie, E	12/26/1993	dallen@aol.com
<input type="checkbox"/> Alper, Heather	1062556430	248235	N	Active	11	E101	Weisz, J	11/15/1993	halper@blueyonder.com
<input type="checkbox"/> Amico, Elaine	1304051361	244040	N	Active	12	B205	Ambrose, A	6/20/1991	epilla@hotmail.com
<input checked="" type="checkbox"/> Amico, Joseph	1215480988	208314	N	Active	11	A101	Medwar, D	1/2/1993	jamico@eudora.com
<input type="checkbox"/> Amico, Timothy	1062645502	241387	N	Active	09	E201	Brandy, H	1/14/1995	tamico@eudora.com
<input type="checkbox"/> Anderson, Isabella	1260305854	283490	N	Active	09	B105	Bowers, J	5/12/1995	ipost@earthlink.com
<input type="checkbox"/> Anderson, Lee	1208286062	260687	N	Active	10	D104	Holland, K	2/24/1994	lvenkatesh@earthlink.com
<input type="checkbox"/> Anderson, Margaret	1395487850	236301	N	Active	11	D201	Liu, K	6/20/1992	manderson@comcast.com
<input type="checkbox"/> Anderson, Rose	1188397751	255264	N	Active	12	D201	Liu, K	5/3/1992	randeron@eudora.com
<input type="checkbox"/> Anderson, Taylor	1038939046	231707	N	Active	10	A204	Barr, D	1/18/1994	thoulgate@aol.com

3. On the **Options** menu, click **Show Selected**.

The Student List displays only the students you selected:



After you select a student or group of students, the text below the icons displays Custom Selection to alert you that you are viewing a list of students you filtered.

Important: Your Student List should display only the students for whom you want to perform a function or who you want to include on a report. If you only select checkboxes for a few students and then print a report without clicking **Show Selected**, the report prints for all students in the school – not only those you selected.






4. Do one of the following:
 - Click an option on the **Options** menu to perform a function for those students.
 - Click a report on the **Reports** menu to print a report containing information for those students.


Browsing Through a List of Student Records

On the Student List, after you select a student and use the side-tabs to view that student’s information, use the record navigation bar to quickly browse through the list of students:



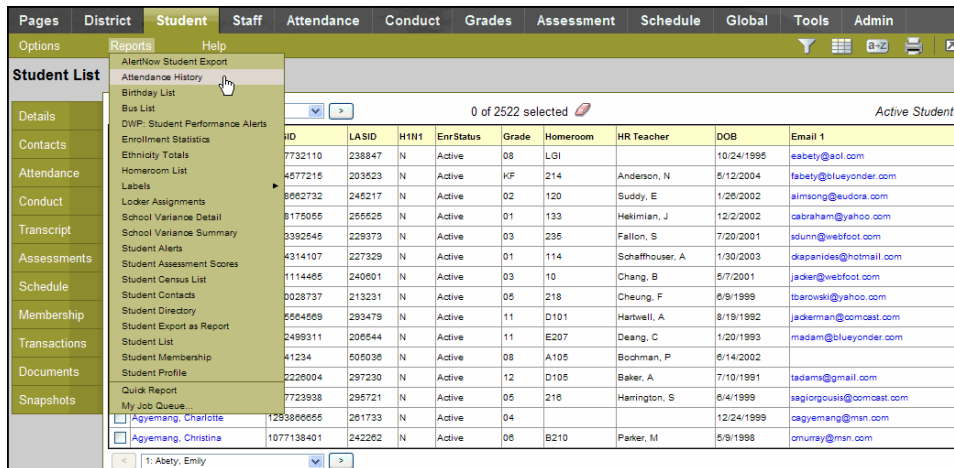
The following table describes each button on the bar:

Use this button	To access
First Record 	The first record in the current student list.
Previous Record 	The previous record in the current student list.
Search Records 	A pick list of the current student list.
Next Record 	The next record in the current student list.
Last Record 	The last record in the current student list.

Note: The system displays the same page for each student when you use the record navigation bar. For example, if you view the first student's Details page, and then click **Next Record** , the Details page for the next student appears.

Using the Student List Reports Menu


There are numerous reports available on the Reports menu from the Student tab:



ID	LA SID	H1N1	Enr Status	Grade	Homeroom	HR Teacher	DOB	Email 1		
7732110	238847	N	Active	08	LGI	Anderson, N	10/24/1985	esabety@scil.com		
8577215	203523	N	Active	KF	214	Anderson, N	5/12/2004	fsabety@blueyonder.com		
8062732	245217	N	Active	02	120	Suddy, E	1/26/2002	aimsong@evdora.com		
8176055	255525	N	Active	01	133	Helimian, J	12/2/2002	cabraham@yahoo.com		
8392545	229373	N	Active	03	235	Fallon, S	7/20/2001	sdunn@webfoot.com		
8314107	227329	N	Active	01	114	Schaffhouser, A	1/30/2003	dkapanides@hotmail.com		
1114485	240601	N	Active	03	10	Chang, B	5/7/2001	jackie@webfoot.com		
8028737	213231	N	Active	05	218	Cheung, F	6/9/1989	lbarowski@yahoo.com		
8564569	283479	N	Active	11	D101	Harwell, A	8/19/1992	jackieman@comcast.com		
2499311	206544	N	Active	11	E207	Deang, C	1/20/1993	madam@blueyonder.com		
41234	605036	N	Active	08	A105	Bochman, P	6/14/2002			
2228004	297230	N	Active	12	D105	Baker, A	7/10/1991	tadam@gmail.com		
7723938	295721	N	Active	05	216	Harrington, S	6/4/1999	sejorgousis@comcast.com		
<input type="checkbox"/>	Agymang, Charlotte	129386655	281733	N	Active	04		12/24/1999	agymang@msn.com	
<input type="checkbox"/>	Agymang, Christina	1077138401	242262	N	Active	06	B210	Parker, M	5/9/1998	omurray@msn.com

You can also generate a Quick Print or a Quick Report.

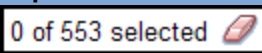
Generate a Quick Print Using the Printer Icon

You can generate a Quick Print using the **Quick Print** icon  in the menu bar on any list page. Clicking this icon once is the same as going to the **Options** menu, clicking **Quick Report**, and selecting the Simple report type.

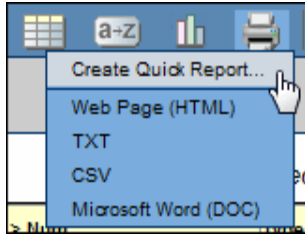
Or, to create a different type of Quick Report, click the **Quick Print** icon and then select **Create Quick Report** to go directly to the Quick Report wizard.

To generate a Quick Print using the Quick Print icon:

1. Go to the list page containing the type of data you want to report on.
2. Select the records you want to include on the report.
3. On the **Options** menu, click **Show Selected**.


Important: Quick Prints include any records that appear on the current list  (in this example, 553). Use a filter, query, snapshot, or custom selection to limit the number of records to include in your Quick Print.

4. Click the **Quick Print** icon  in the menu bar. The menu expands:




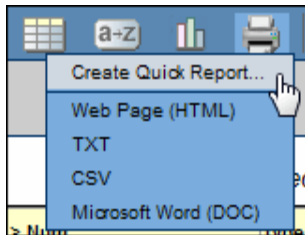
5. Click one of the following format options:
 - **Web Page (HTML):** to view the information in an HTML file.
 - **CSV:** to view the information in a text file that separates each field with a comma. If saved, the file will have a .CSV extension
 - **TXT:** to view the information in a text file that separates each field with a comma. If saved, the file will have a .TXT extension.

Note: The two comma-separated values formats (CSV and TXT) create identical files; the only difference is the file extension. Some Web browsers only handle one extension properly.

6. **Microsoft Word (DOC):** to view the information in a Word document. The data appears in a table, which has all the available options for borders and shading.
7. To print the report, do one of the following:
 - From your browser window or dialog box, go to **File > Print**.
 - From Microsoft Word, click the **Office Button**  and then click **Print**.

To generate a detail, summary, or group Quick Report using the Quick Print icon:

1. Go to the list page containing the type of data you want to report on.
2. Select the records you want to include on the report.
3. On the **Options** menu, click **Show Selected**.
4. Click the **Quick Print** icon  in the menu bar. The menu expands:



5. Click **Create Quick Report** to open the Quick Report wizard.

Generate a Quick Report Using the Reports Menu

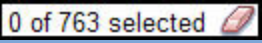
Use a Quick Report to create an on-the-fly report of the information you are viewing on a list page. You decide what's on it, and the system formats it to look professional.

If there is a particular report that you run every week, such as an attendance report, creating and saving a Quick Report means that you only have to set up the formatting once. Then, every time you run the report it will look the way you want it to.


For example, maybe you like to shade every other line for easier reading and set up the report to pull statistics such as boy totals and girl totals per attendance category. If you save your Quick Report and run it each week, the formatting will look the same, but the information on the report will vary based on the data in the system.

Other users in your school and district can create and share Quick Reports. Before creating your own Quick Report, you might want to check the saved reports to see if it already exists.

Before starting to create your Quick Report, get your list page (such as the Student List) showing the fields and records that you want to include. This minimizes the setup time in the Quick Report wizard.

Important: Quick Reports include any records that appear on the current list  (in this example, 763). Use a filter, query, snapshot, or custom selection to limit the number of records to include in the Quick Report.

The Quick Report wizard contains eight steps, but only the first four are required. The others let you customize the report's format and design. If you prefer, you can do the formatting in Excel.

Note: You can also create a Quick Report from the **Quick Print** menu. If you just want to print the information on your screen, click the **Quick Print** icon  and then go directly to selecting an output format, such as **Web Page (HTML)**.

To generate a Quick Report from the Reports menu:

On the **Reports** menu, click **Quick Report**. The Quick Report wizard appears:

Quick Report: Source Step 1 of 8

Source

New report

Saved report

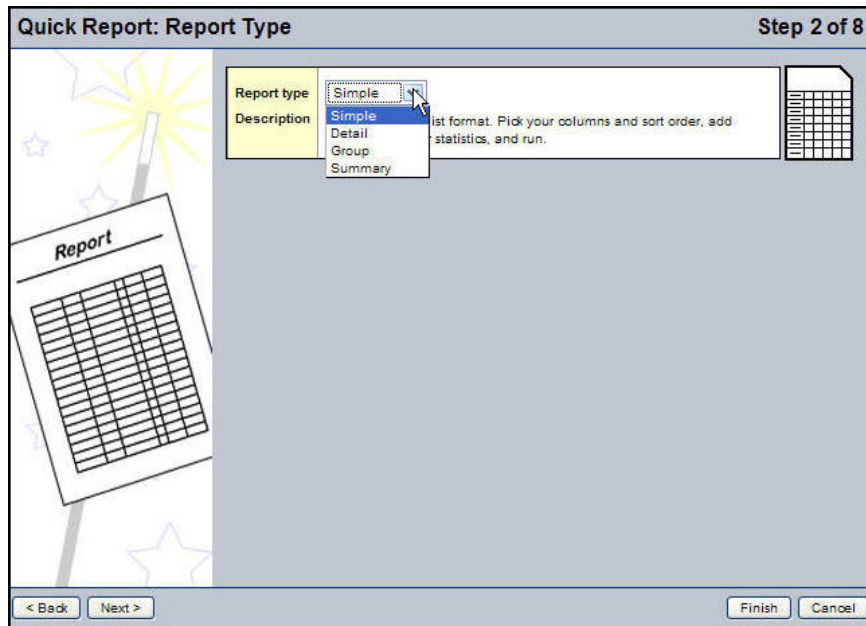
< Back Next > Finish Cancel

The Quick Report wizard has eight steps:

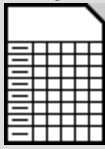

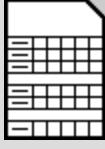
Step 1: Source


1. Do one of the following to determine if you want to create a new Quick Report or use one that's been saved:
 - Select **New report** to create a new report.
 - Select **Saved report** to use a report you or another user previously created. The page displays a list of the reports available to you. You can click **Finish** to immediately print the report without making any changes.
2. Click **Next**.

Step 2: Report Type



1. Click the **Report type** drop-down to select the type of report you want to run:

Type	Description
<p>Simple</p> 	<p>The Simple Quick Report produces a list of the records and fields you select to include. You select the columns and sort order. You can also add totals or statistics, which appear in a summary table below the list of records.</p> <p>Example: The school nurse wants a list of all eleventh and twelfth graders sorted by grade level, then homeroom.</p>
<p>Detail</p> 	<p>The Detail Quick Report produces a page for each record, and the report aligns the data fields vertically instead of horizontally.</p> <p>For example, when running a Detail Quick Report on a student-based list, each student record appears on a separate page, with the fields you select as the rows.</p> <p>Example: A new guidance counselor is starting and would like a list of his students with basic demographic information, as well as a photo, to put in each student's profile folder. Plus, he wants to know how many boys and girls he's been assigned.</p>
<p>Group</p> 	<p>The Group Quick Report groups records by the fields you select. For example, on a Student List you can group records by homeroom.</p> <p>After you select Group, Step 3 displays the fields available to group records by. Then, on Step 5, you can include page breaks as well as calculate totals by group. For example, use Group Quick Reports to print homeroom or bus lists.</p> <p>Example: The new school year is starting, and you need to pull together homeroom lists for the homeroom teachers that also show the number of students in each room.</p>

Type	Description
<p>Summary</p> 	<p>The Summary Quick Report hides individual records from the list and produces a list of cumulative values based on the records.</p> <p>Use this report to print totals and other statistical reports.</p> <p>After you select Summary, Step 3 displays the fields available to produce values for. Then, on Step 5, you can include page breaks, as well as calculate totals.</p> <p>Example: The principal would like to know, for each course, how many sections are offered and what is the average enrollment for the course.</p>
<p>Notes: The Group and Summary Quick Reports are the same, except the Group report shows individual records and totals and the Summary report only shows totals.</p>	
<p>Notes: When you select a report type, a description of the report type and a visual representation of it appears to the right.</p>	

Note: If you selected the Group or Summary report type, you need to make your group type selection. See Step 3: Field Selection for instructions.

2. Click **Next**.

Step 3: Field Selection

Quick Report: Field Selection **Step 3 of 8**

Available Fields Sort A-Z

Student

- Identifier
- Photo
- Last name
- First name
- Middle name
- Name
- Title
- Address
- Suffix
- Local identifier
- Gender**
- State identifier
- Date of birth
- Year of graduation
- Grade level

Add >>

<< Remove

Selected Fields

- Name
- Local identifier
- State identifier
- Grade level
- Homeroom
- Date of birth
- Enrollment status
- Primary email


Up
Down

< Back Next > Finish Cancel

1. Select the fields you want to include on the report and the order you want them to appear in.

Note: Fields are organized by table. When the Student table is selected, fields in that table, such as **Name** and **Grade level**, appear below. If you do not see the field you are looking for, click the drop-down arrow to select a different table.

2. Highlight a field in the **Available Fields** column, then click **Add** to add the field to the **Selected Fields** column. To select several fields next to each other, press **SHIFT** and the **Up** or **Down** arrow on your keyboard to select the fields. To select several fields together that do not appear next to each other, press **CTRL** while you click each field you want to include.

Note: Fields in the **Available Fields** column for each table are listed from most commonly used to least commonly used. To display the fields in alphabetical order, click the **Alpha Sort** button .

Note: Sort the fields in the **Selected Fields** column to appear in the order you want them on the report. The first field in the **Selected Fields** column is the first field to appear for each record on the report. Highlight a field, and click **Up** or **Down** to move it.

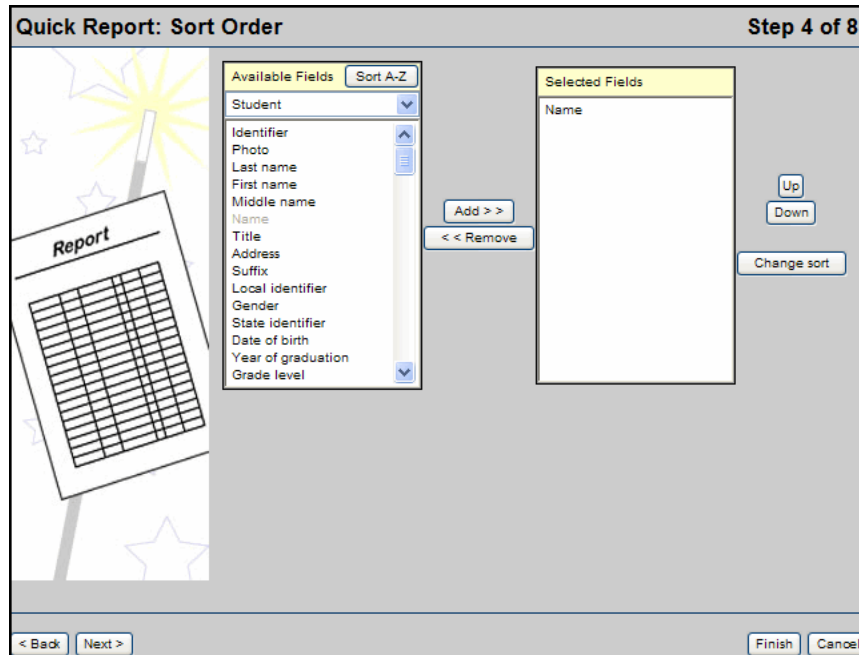
Note: If you are creating a new Quick Report, the **Selected Fields** column displays all fields in the current field set by default. If you are running a saved Quick Report, the **Selected Fields** column displays the fields previously selected for this report.

To remove a field from the **Selected Fields** column, highlight it, and click **Remove**.


3. Click **Next**.

Step 4: Sort Order

Note: Steps 4-8 are optional for formatting. If you are not concerned about your report's appearance, you can click **Finish** now.



1. To determine how the system sorts the overall report, such as which records print first, do the following:
2. In the **Available Fields** column, highlight the field you want the system to use to sort the report by, and click **Add** to move the field to the **Selected Fields** column. You can continue to select fields and add them below the primary sort.

Note: Fields in the **Available Fields** column for each table are listed from most commonly to least commonly used. To display the fields in alphabetical order, click the **Alpha Sort** button .

3. In the **Selected Fields** column, highlight the fields and click **Up** and **Down** to determine the sort order (the field that appears first in the column is the primary sort, then the secondary sort, and so on).
4. Click **Next** to continue with setting up grouping and formatting options (optional). Or, click **Finish** to run your report.

Step 5: Totals and Statistics

Quick Report: Totals and Statistics Step 5 of 8

Totals

Group	Total Count	Page Break
Overall	<input type="checkbox"/>	<input type="checkbox"/>
Year of graduation	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Statistics

Name:

Field	Function	Reset By
Home language	MAX	Group: Year of graduation <input type="button" value="X"/>
Name	MAX	Group: Year of graduation <input type="button" value="X"/>

< Back Next > Finish Cancel

1. In the **Totals** section, to include totals of records on the report, select the **Total Count** checkbox next to the group.

Note: If you select the **Group** report type in Step 2, the report can also include totals by any of the groups you defined in that step. Then, select the **Page Break** checkbox if you want the report to start on a new page after each group and its totals appear.

2. In the **Statistics** section, for each field you include on the report, the report can provide the minimum, maximum, and total count of each field. For example, click the drop-down to select **Gender**, click **Add**, and select **COUNT** to see totals of boys and girls. You can also track field averages and sums for numeric fields. Following any statistic selection, if you have selected group by fields, specify exactly when you want that statistic to reset. By default, the statistic will be reset only at the end of the report. If a group field is chosen, the value will be reset at the end of that grouping, allowing you to view group-based statistics.

You can add several statistics and resets for each field.

3. Click **Next**.

Step 6: Format Options

Quick Report: Format Options Step 6 of 8

Header

Report title: GPA Report

Print date:

Body

Format: Web Page (HTML)

Font face: Arial

Font size: Medium

Grid lines: Horizontal & Vertical

Shade alternate lines:

< Back Next > Finish Cancel

1. Use the following table to enter information in the fields:

Field	Description
Report title	Type a title for the report.
Print date	Select the Print date checkbox if you want the report to print the current date.
Format	<p>Select one of the following:</p> <ul style="list-style-type: none"> • Web Page (HTML) to view the information in an HTML file. • Comma-separated values (CSV) to print the information in a text file that separates each field with a comma. The file will be saved with a .CSV extension. • Comma-separated values (TXT) to print the information in a text file that separates each field with a comma. The file will be saved with a .TXT extension. <p>Note: The two comma-separated values formats (CSV and TXT) create identical files; the only difference is the file extension. Some Web browsers only handle one extension properly. Use the extension that works for your browser.</p>
<p>Note: Some of the following options are only available for specific formats.</p>	
Font face	Select the font you want the report to print in.
Font size	Select the font size of the report.
Grid lines	Select the type of grid lines (vertical, horizontal, or both), if any.
Shade alternate lines	Select this checkbox if you want the report to shade every other line for easier viewing.

2. Click **Next**.

Step 7: Field Format Options

Quick Report: Field Format Options Step 7 of 8

Field: Name

Title: Name

Custom Width

Number of characters: []

Overflow handling: Wrap

Font face: Arial

Font size: Medium

Bold:

Italic:

Underline:

< Back Next > Finish Cancel


1. For each field that displays on the report (the columns of information that appear), you can define a custom width in number of characters, and specific font and text effects.

Note: If you include a field that contains a large amount of text, you can define the number of characters to display. Then, you can select a value at the **Overflow handling** field. For example, if you select **Wrap**, any text after the custom width appears on the next line of the report.

2. Click **Next**.

Step 8: Save Options

1. Use the following table to enter information in the fields:


Field	Description
Save Options	<p>Select one of the following in the Save Options box:</p> <ul style="list-style-type: none"> • Select Don't save if you do not want to save the report parameters you just selected. When you click Finish, if you like the report that appears, you will have to go through the wizard again to recreate it. • Select Save to save any changes you made to an existing saved report. • Select Save as to save the parameters you entered as a new Quick Report.
Name	If you selected Save as , type a name for the report (this is the report's file name, not its title).
Owner Type	Select the type of report (User, School, Intermediate Organization, or District). The options available to you depend on the view you are logged into and your privileges.
Owner Name	Click  to change the name of the report's owner.

2. Click **Finish**. The report displays the information in the format you selected.

Use Quick Letters

Use the Quick Letters feature to quickly create and customize attendance, conduct, or grade-related letters from any student list page for students meeting a given set of criteria. You can then print these letters as one print job and mail them to the students or their parents/guardians.

For instance, you might use Quick Letters to create a custom form letter regarding students who have five or more absences so far this semester. The letter would notify parents that their students are in danger of losing course credit. You could also use this feature to create a more general letter for all students informing them of the school attendance policy.

To create a Quick Letter, click the **Quick Letter** icon  on any student list page and complete the Quick Letter wizard. For instructions on completing the Quick Letter wizard, see the "Create a Quick Letter" Help topic.

Create a Quick Letter

On any student list page, click the **Quick Letter** icon  to access the following options:

- **Create Quick Letter:** Brings up the Quick Letter wizard, which lets you customize your Quick Letter in detail and access saved letters.
- **Attendance:** Brings up a streamlined version of the Quick Letter wizard that begins on the input page for an attendance-related letter.
- **Conduct:** Brings up a streamlined version of the Quick Letter wizard that begins on the input page for a conduct-related letter.
- **Grades:** Brings up a streamlined version of the Quick Letter wizard that begins on the input page for a grades-related letter.

Note: You can access the student list page by clicking the Student tab while logged on to the District, Intermediate Organization, or School view.

To create a Quick Letter:

On any student list page, click  and select **Create Quick Letter**. The six-step Quick Letter wizard appears:

Quick Letter: Source Step 1 of 6

Source

New letter

Saved letter

< Back Next > Finish Cancel

Step 1: Source

Do one of the following:

- **New letter:** Select this option to create a Quick Letter from scratch. Then click **Next**.
- **Saved letter:** Select this option to either resend a saved Quick Letter or use it as the basis for a new letter. A table of saved Quick Letters appears. Select the letter you want to re-create or use as a basis for a new letter. Then either click **Next** to skip to Step 3 and customize your letter, or click **Finish** to re-create the letter without any changes.

Step 2: Letter Type

Quick Letter: Letter Type Step 2 of 6

Letter Type Quick Letter - Attendance ▼

< Back Next > Finish Cancel

1. Click the **Letter Type** drop-down to select the type of Quick Letter you want to create:
 - **Quick Letter – Attendance:** Creates a letter for students who meet certain attendance criteria, such as having four or more absences in the past month.
 - **Quick Letter – Conduct:** Creates a letter for students who meet certain conduct criteria, such as having more than one suspension in the semester so far.
 - **Quick Letter – Grades:** Creates a letter for students who meet certain grades criteria, such as having a GPA less than or equal to 2.0.
2. Click **Next**.

Step 3: Input




Quick Letter: Input
Step 3 of 6

Organization School Start date End date Students to include Search value 1st criteria section Criteria 2nd criteria section	Foillett Schools Crow Point High School 8/1/2014 8/7/2014 Current selection <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;">Code</th> <th style="width: 20%;">Reasons</th> <th style="width: 15%;">Operator</th> <th style="width: 15%;">Value</th> <th style="width: 10%;">Exclude excused</th> <th style="width: 10%;">Connector</th> </tr> </thead> <tbody> <tr> <td>Absences</td> <td></td> <td></td> <td>0.0</td> <td><input type="checkbox"/></td> <td>And</td> </tr> <tr> <td>Tardies</td> <td></td> <td></td> <td>0.0</td> <td><input type="checkbox"/></td> <td>And</td> </tr> <tr> <td>Dismissals</td> <td></td> <td></td> <td>0.0</td> <td><input type="checkbox"/></td> <td>And</td> </tr> <tr> <td></td> <td></td> <td></td> <td>0.0</td> <td><input type="checkbox"/></td> <td>And</td> </tr> <tr> <td></td> <td></td> <td></td> <td>0.0</td> <td><input type="checkbox"/></td> <td>And</td> </tr> <tr> <td></td> <td></td> <td></td> <td>0.0</td> <td><input type="checkbox"/></td> <td>And</td> </tr> <tr> <td></td> <td></td> <td></td> <td>0.0</td> <td><input type="checkbox"/></td> <td>And</td> </tr> </tbody> </table>	Code	Reasons	Operator	Value	Exclude excused	Connector	Absences			0.0	<input type="checkbox"/>	And	Tardies			0.0	<input type="checkbox"/>	And	Dismissals			0.0	<input type="checkbox"/>	And				0.0	<input type="checkbox"/>	And				0.0	<input type="checkbox"/>	And				0.0	<input type="checkbox"/>	And				0.0	<input type="checkbox"/>	And
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Next >
Finish
Cancel

1. Use the following table to enter information in the fields:

Note: Some fields appear only for attendance, conduct, or grades-related Quick Letters.

Field	Description
Start date (Attendance and Conduct letters only)	Type the start date of the date range you want to search for attendance records or conduct incidents within, or click  and select it from the pop-up.
End date (Attendance and Conduct letters only)	Type the end date of the date range you want to search for attendance records or conduct incidents within, or click  and select it from the pop-up.
Transcript Definition (Grades letters only)	Click  . The Transcript Definition Pick List appears. Select the transcript definition used by the school that the students you want to create a Quick Letter for attend. The fields of this transcript definition become the criteria that you can choose from when determining which students to create the letter for. Click OK .
Students to include	To further limit the set of students who meet your Quick Letter's criteria, select one of the following options: <ul style="list-style-type: none"> • Current selection: Only includes students within the current filter on the student list page. • YOG: Only includes students who have a specific year of graduation. You can specify the YOG at the "Search value" field. • Snapshot: Only includes students who are part of a specific saved snapshot. You can specify the snapshot at the "Search value" field.
Search value	If you selected YOG or Snapshot at the "Students to include" field, type the specific YOG or snapshot name you want to restrict your search to.
Criteria <ul style="list-style-type: none"> • The 1st criteria section includes a selection of preset, common attendance codes (for attendance-related letters) or conduct record types (for conduct-related letters) that you can use as criteria for your letter. • The 2nd criteria section lets you select other attendance codes or additional instances of conduct record types as criteria from drop-downs. 	
<p>Note: Grades-related letters do not have a 1st criteria section, since the transcript definition fields you use as criteria vary depending on the transcript definition you select.</p>	
Code (Attendance letters only)	To include other attendance codes in your criteria than those listed by default in the 1st criteria section — Absences, Tardies, and Dismissals — select those codes from the drop-downs in the 2nd criteria section.
Type	To include more instances of the conduct record types listed by

Field	Description
(Conduct letters only)	<p>default in the 1st criteria section — Incidents and Actions — in your letter’s criteria, select those types from the drop-downs in the 2nd criteria section.</p> <p>For example, you might want to create a Quick Letter for students who have either more than one suspension or more than four detentions in a date range. In this case, you would need to have two Incidents rows, one for suspensions and one for detentions.</p>
Fields (Grades letters only)	<p>Click the drop-downs to select the transcript definition fields you want to use as criteria.</p>
Reasons (Attendance letters only)	<p>To restrict your criteria to include only students who have an attendance code paired with a specific reason, select the reason from the drop-down.</p> <p>For example, to create a Quick Letter for students who had absences due to illness, in the Absences row, select Sick (or another value) from the Reasons drop-down.</p>
Code	<p>To restrict your criteria to include only students with a specific type of conduct incident or action, select the appropriate code from the drop-down.</p>
Operator	<p>To restrict your criteria to include only students with a certain number or range of attendance codes, conduct records, or grades-related criteria, select the appropriate numerical operator from the drop-down.</p> <p>For example, to create a Quick Letter for students who had one or more suspensions in a date range, you would select Greater than or equal to as an operator and type 1 in the Value field.</p> <div style="background-color: #e6f2ff; padding: 10px; border: 1px solid #0056b3;"> <p>Note: If you leave the Operator and Value fields blank, the letter’s criteria will include all students who have any value in their student record for the attendance code, conduct record type, or transcript definition field defined in that row.</p> <p>For example, say you want to create a generic letter to all students detailing the school’s attendance policy. You could create an attendance-related Quick Letter, and leave the Operator and Value fields blank in the Absences, Tardies, and Dismissals rows. This would include students who have any value, including none, for those fields in their attendance records.</p> </div>
Value	<p>If you selected an operator to restrict your criteria to include only students with a certain number or range of attendance codes,</p>

Field	Description
	conduct records, or grades-related criteria, type the value modified by that operator.
Exclude excused (Attendance letters only)	Select this checkbox to exclude from your criteria any instances of that row's attendance code that were excused by a teacher or staff member.
Connector	To include multiple criteria, select one of the following connector options from the drop-down: <ul style="list-style-type: none"> • And: Searches for students who satisfy both the criterion defined in that row and the criterion defined in the next row. • Or: Searches for students who satisfy either the criterion defined in that row or the next row.

- Do one of the following:
 - Click **Next** to customize the header for your Quick Letter.
 - Click **Finish** to create the letter using the default or saved header, body text, and options settings.

Step 4: Create Header

Quick Letter: Create Header
Step 4 of 6

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Follett Schools

Attendance Letter

Jul 29, 2014

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Next >
Finish
Cancel

Customize the header that appears on your letter using a modified version of Aspen’s rich text editor. For instructions on using the additional tools included in the modified editor, [see Step 5](#).

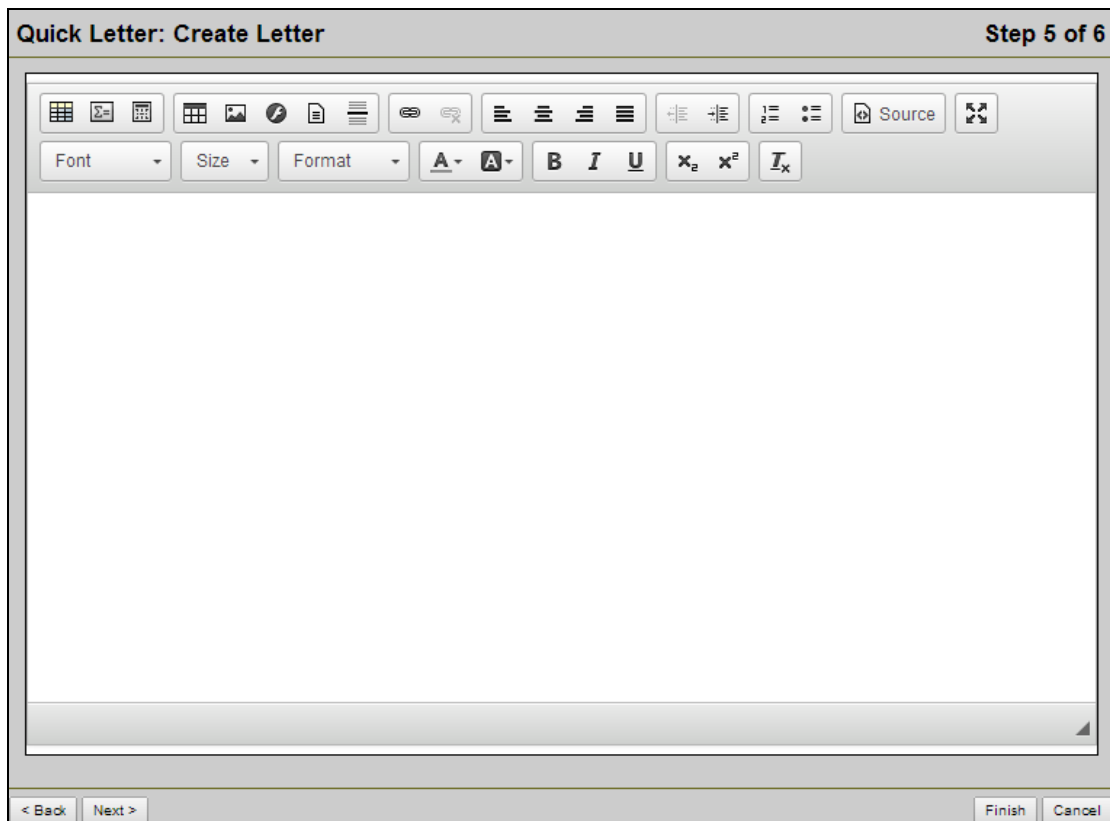
When creating a letter, certain information appears in the header by default. Your district name is displayed in the header’s top-left corner, the school name in the top-right (if you are creating a Quick Letter at the school level), the date in the bottom-right, and the letter type in the center. To customize the default header, do the following:

1. Make your modifications using the rich text editor.


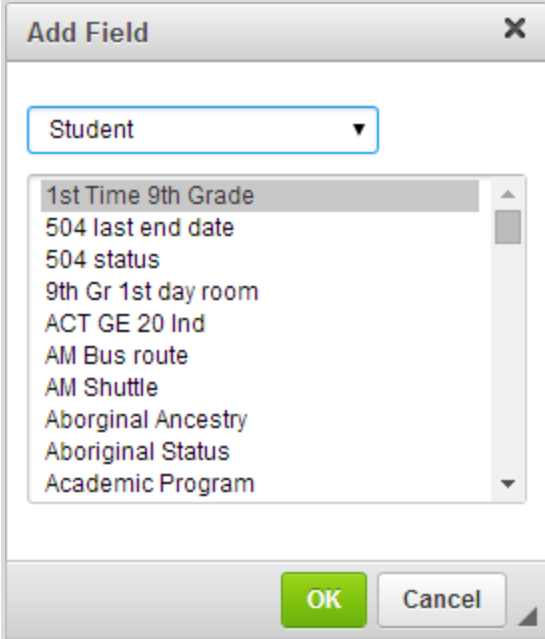

Note: For more information on using Aspen’s rich text editor, see the “Using the Rich Text Editor” Help topic.

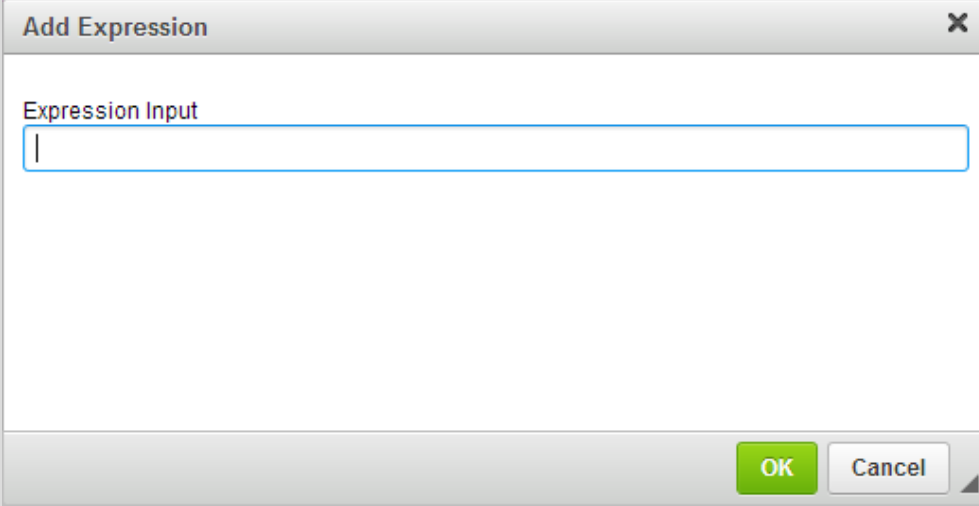

2. Do one of the following:
 - Click **Next** to customize your Quick Letter’s body text.
 - Click **Finish** to create the letter using the default or saved body text and options settings.

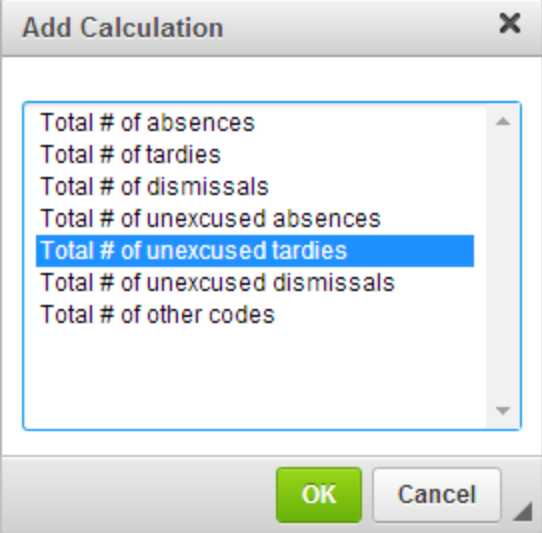
Step 5: Create Letter



1. Type the body text for your Quick Letter using a modified version of Aspen’s rich text editor.
 In addition to the standard text and media editing tools, the modified rich text editor provides three additional tools designed for Quick Letters. Use the following table as a reference for using these tools:

Text Editor Tool	Function
	<p>Field: Use this tool to insert a field, such as “Student name,” into the text box. When you complete the Quick Letter wizard, this field is populated with the appropriate information for each student.</p> <p>To insert a field in your Quick Letter, click the icon. The Add Field pop-up appears:</p>  <p>Click the drop-down to select the appropriate table for your field. For instance, if you want to add a field for the student’s State/Province, you would select the Physical Address table. The pick list refreshes to display all fields in that table. Select the appropriate field, and click OK.</p> <div style="background-color: #e6f2ff; padding: 5px; border: 1px solid #0056b3;"> <p>Note: Table and field names are determined by your Aspen system administrator, and might differ from those shown.</p> </div>
	<p>Expression: Use this tool to insert an expression into the text box. Expressions are variables that call and display information from the student record of each student included in the letter’s criteria. They can also be modified by filters that alter their output.</p> <p>For example, you could use this tool to insert an expression in your letter’s body text that displays a pronoun (“He” or “She”) based on the gender code in the student record.</p> <p>To insert an expression in your Quick Letter, click the icon. The Add Expression</p>



Text Editor Tool	Function
	<p>pop-up appears:</p>  <p>Type the expression in the Expression Input field, and click OK.</p> <div style="background-color: #e6f2ff; padding: 5px; border: 1px solid #0056b3;"> <p>Note: The expressions that you can insert using the Expression tool are the same as the variables used in gradebook comments. For more information on these expressions and examples of complete expressions, see the “Create Comments in a Comment Bank” Help topic.</p> </div>
	<p>Calculation: Use this tool to insert a predetermined calculation, such as the student’s total number of suspensions, into the text box. When you complete the Quick Letter wizard, Aspen evaluates this calculation for each student included in the letter’s criteria.</p> <p>To insert a calculation into your Quick Letter, click the icon. The Add Calculation pop-up appears:</p>

Text Editor Tool	Function
 <p data-bbox="469 934 1211 968">Select the appropriate calculation from the pick list, and click OK.</p> <div data-bbox="475 995 1430 1115" style="background-color: #e6f2ff; padding: 5px;"><p>Note: The calculations available to you in the Add Calculation pop-up depend on the type of Quick Letter you are creating.</p></div>	

2. When you are finished customizing your Quick Letter's body text, do one of the following:
 - Click **Next** to adjust the letter's options.
 - Click **Finish** to create the letter using the default or saved options settings.

Step 6: Options

Quick Letter: Options
Step 6 of 6


Options

Don't save
 Save
 Save as

Name	<input style="width: 80%;" type="text"/>
Owner	
Type	School ▼
Name	Gary Oaks Secondary SD 73 🔍

< Back
Next >
Finish
Cancel

1. In the Options section, select one of the following:
 - **Don't save:** Aspen does not save the letter. This is the default setting.
 - **Save:** Aspen saves the letter using previously-provided name and owner information. This option is only available when customizing a previously-saved Quick Letter.
 - **Save as:** Aspen saves the letter using the name and owner information you provide in Step 2.
2. If you selected "Save as", use the following table to fill in the letter's name and owner information:

Field	Description
Name	Type a file name for the letter.
Owner	
Type	<p>Click this drop-down to select one of the following, depending on your user privileges:</p> <ul style="list-style-type: none"> • User: Gives a user or yourself access to the letter. • School: Gives users at a school access to the letter. • Intermediate Organization: Gives all users in an intermediate organization access to the letter. • District: Gives all users in the district access to the letter.
Name	<p>Click . A pop-up lists the organizations or users you selected in the Type field that you have access to. Select a specific owner for the letter, and click OK.</p>

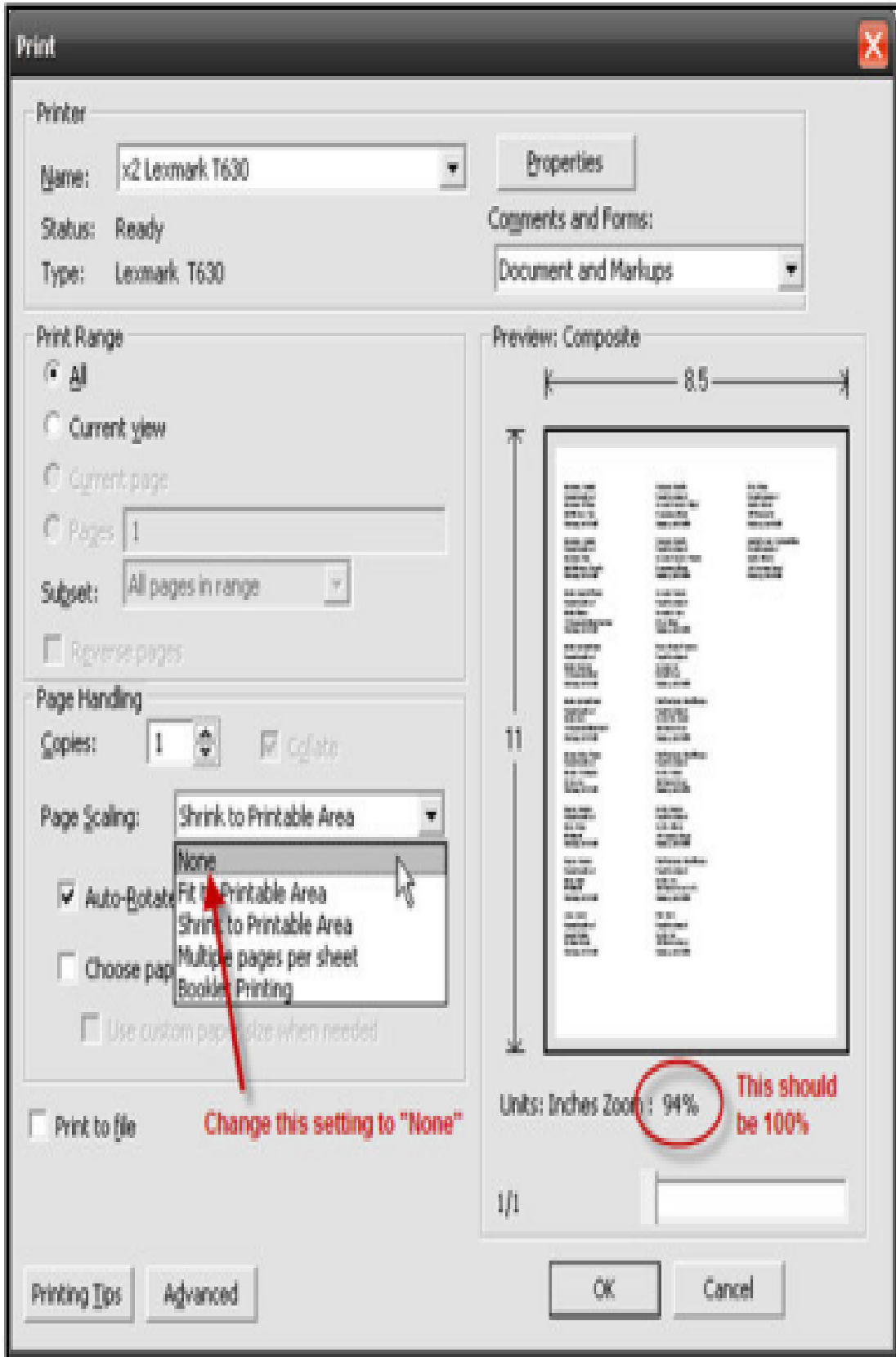
3. Click **Finish**. The letter appears.

Print Labels in Aspen

When printing any kind of address label report, there is a setting in Adobe Acrobat that must be changed for the print to align properly with the label grid.

Adobe Acrobat employs **Page Scaling** when you print a document so that it fits within the limits of your printer's margins. Most printers cannot print to the left and right edges of a page, so the default setting in Adobe is **Shrink to Printable Area**. This is fine for most reports but can cause trouble with labels where positioning is critical.

To correct this problem, change your settings for **Page Scaling** to **None** and **Zoom** to **100%** when you print your labels, as shown in the following screenshot:



Note: You don't have to change the page scaling back to **Shrink to Printable Area** for other reports unless you find that some parts of the document are getting cut off. Whenever printing labels, though, check to make sure the **Page Scaling** is set to **None** and the **Zoom** is set to **100%**.

Commonly Used Label Sizes in Aspen

The following table lists the dimensions of commonly used label sizes in Aspen.

Band height in iReport is 72 pixels.

Label Size	02x05	02x10	02x15	03x10
Length	4"	4"	3.4375"	2.5935"
Height	2"	1"	0.667"	1"
Top Margin	0.5"	0.5"	0.5"	0.5"
Bottom Margin	0.5"	0.5"	0.5"	0.5"
Right Margin	0.18"	0.175"	0.5"	0.1875"
Left Margin	0.18"	0.175"	0.5"	0.1875"
Horizontal Spacing (gutter)	0.14"	0.15625"	0.557"	0.15625"
Vertical Spacing (gutter)	0"	0"	0"	0"

Maintaining Student Information

After you search for and select a student on the Student tab, you can enter, edit, or view that student's information on the side-tabs. You can enter or view the following information:

- Details, such as address and ethnicity
- Student alerts
- Contacts
- Attendance
- Conduct
- Transcript
- Assessments
- Credit Summary
- Grade Point Summary
- Schedule
- Requests

- Enrollment
- Programs
- Events
- School Associations
- IEPs
- Documents
- Fees

You can also view information for archived students.

View Archived Students

In Aspen, you view archived students in the History School. Students are archived to the History School when you execute Step 5 of the End-of-Year Rollover wizard.




To view archived students in the History School:

1. On the settings bar, click **Select School**.
2. Select the **History School**, and click **OK**.



Student Alerts



Student alerts are important bits of information about a student that are represented by an icon next to the student's name on student pages. These icons alert users to information they should know about a student.

Create the following types of alerts for students:

- **Medical alerts**  can inform users about a student's medical condition.
- **Legal alerts**  can inform users about certain legal situations they should be aware of.
- **Other alerts** can inform users about any other important information staff members should know about a student. When you create an Other alert, you select the icon you want to appear. For example, you might create an Other alert to let users know that a student has a change in transportation this week, and use the **Transportation Alert** icon .


Note: The system contains over 150 icons you can use to represent Other alerts. You must add these icons to the Alert Icons reference table to make them available.


- **Quick Status alerts**  can be used to quickly view where a student currently is in the school, based on their schedule.
- **Education Plan alerts**, such as a 504 Plan alert , appear if a student has an active education plan. Your district can [select which alert appears for which education plan](#).

- **Cross-Enrollment alerts**  indicate that a student is taking classes or receiving services at more than one school.
- **Daily Absence alerts**  indicate that a student has been marked absent for all or part of a day.

Create Medical, Legal, and Other Alerts

Use alerts to let users know about a student's legal situation, medical condition, or any other

information users should know about a student. After you enter an alert, the **Legal Alert**  or

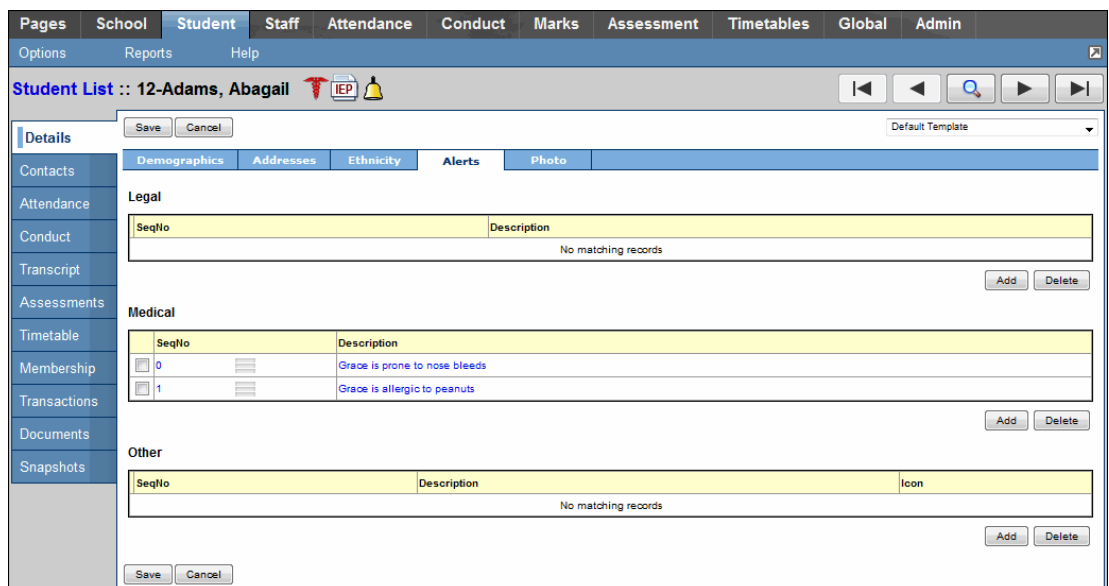
Medical Alert  icon appears next to the student's name on the Student pages in Aspen. Only users with appropriate privileges can see these icons.

Notes:

- You can also create Other alerts to let users know about any other important information pertaining to a student.
- At the end of every school year, make it a point to clean up your student alerts, as these stay on the student's record until manually deleted.

To enter Medical, Legal, or Other Alerts:

1. Log on to the District or School view.
2. Click the **Student** tab.
3. [Search for and select the student.](#)
4. Click the **Details** side-tab. The Details page for that student appears.
5. Click the **Alerts** sub-tab. The page displays any Legal, Medical, or Other alerts already created for the student:




The screenshot shows the Aspen Student Information System interface. The top navigation bar includes tabs for Pages, School, Student, Staff, Attendance, Conduct, Marks, Assessment, Timetables, Global, and Admin. The main content area is titled "Student List :: 12-Adams, Abigail" and includes icons for IEP and a bell. The "Details" side-tab is active, and the "Alerts" sub-tab is selected. The Alerts section is divided into three categories: Legal, Medical, and Other. The Legal section shows "No matching records". The Medical section shows two alerts: "Grace is prone to nose bleeds" (SeqNo 0) and "Grace is allergic to peanuts" (SeqNo 1). The Other section shows "No matching records".

SeqNo	Description
No matching records	

SeqNo	Description
<input type="checkbox"/> 0	Grace is prone to nose bleeds
<input type="checkbox"/> 1	Grace is allergic to peanuts

SeqNo	Description	Icon
No matching records		

Note: When there is more than one alert under a field, click and drag the **Sequence Icon**  to change the order in which they appear.

6. Do one or more of the following:
 - Click **Add** below **Legal** to add a Legal alert.
 - Click **Add** below **Medical** to add a Medical alert.
 - Click **Add** below **Other** to add an Other alert.

The appropriate dialog box appears.

7. Type the **Sequence Number** for the alert you are creating.

Note: This number only applies to the category you are working in. For example, if you have more than one Legal alert, you can determine the order they are listed in (lowest number appears first). However, you cannot use the **Sequence Number** field to put a Medical alert before a Legal alert.

8. Type a **Description** of the alert.


Note: If you create an Other alert, click the **Icon** drop-down to select the icon you want to use to represent this alert for this student. The system groups alerts that use the same icon in the breadcrumbs.

9. Click **Save**. The system displays the appropriate icon next to the student's name.
10. To view the alert, click the icon.

View a Student's Current Location

If your school's schedule is built with your school's bell schedule, your users can view a student's Quick Status on the Student List or in the gradebook.

To view a student's Quick Status:

1. Do one of the following:
 - Log on to the District, School, Special Education, or Health view. Click the **Student** tab. Select a student.
 - Log on to the Staff view. Click the **Gradebook** tab, select a class, and click the **Scores** side-tab. On the **Scores** side-tab, click a student's name.
2. Click the **Quick Status Alert** icon  next to the student's name. The Quick Status dialog box appears:

Managing Student Information

Student	Adam, Kathleen
Time	6/25/2008, 8:26 AM
Current period	
Class	15823-0003 - Standard Biology Jr/Sr
Teacher	Bardan, Yenitza
Location	060 @ Crow Point High School North
Next period	
Class	16211-0004 - Algebra I
Teacher	Barbosa, Filomena
Location	353 @ Crow Point High School North
Daily attendance	
	A (3)
Year-to-date attendance	
Unexcused absences	10
Excused absences	0
Tardies	26
Term-to-date attendance	
	Term 4
Unexcused absences	1
Excused absences	0
Tardies	2
<input type="button" value="Cancel"/>	

The student's name and current date and time appear.


Then, the student's current class information appears, including class name, teacher, and location. The student's next class information also appears. If you check a student's status during a class period that overlaps with another, the box displays a drop-down menu. Select the class you want to view.

Note: If your school built a schedule without bell schedules, the system cannot display current and next class information.

At the bottom, the box displays a summary of the student's attendance, including:

- Today's attendance, if any. If the student has been absent for multiple days in a row, the number of consecutive absences displays next to the code. For example, if the student is absent for the third consecutive day, **A(3)** appears next to **Daily Attendance**.
- Year-to-date attendance, including unexcused absences, excused absences, and tardies
- Term-to-date attendance, including unexcused absences, excused absences, and tardies


View a Student's Cross-Enrollment Status

Sometimes, a student will take classes or receive services at another (secondary) school while attending your school. The **Cross-Enrollment alert**  indicates that a student is taking classes

or receiving services at more than one school.

Note: A student can be associated with a secondary school in all views using the **Student** tab, **Membership** side-tab, **Schools** sub side-tab, **Options > Add**. School users can also select **Create Secondary School Associations** (School view, **Student** tab, **Options**).

The alert appears in the breadcrumbs on student details pages, on student pages that have an **Alerts** column in the field set, and in the gradebook (if allowed by System Administration preferences and a teacher's gradebook preferences).

Click  to view the details of the student's cross-enrollment status.


Cross-enrollment Alert


Name	Beliveau, Ryan
Primary school	Belmonte Middle School

Secondary school(s)

School > Name	Year	Start	End	Type	AttMagType
Gary Oaks Secondary SD 73	2014	07/08/2013	04/08/2014	Secondary	None

View a Daily Absence Alert

Aspen generates a **Daily Absence alert** icon  to indicate that a student was marked absent for all or part of a day. The alert appears in the breadcrumbs on student pages, on student pages that have an **Alerts** column in the field set, and in the gradebook (if allowed by System Administration preferences and a teacher's gradebook preferences).

Click  to view the details of the student's absence:

Daily Absence Alert

Student	Meyers, Noah
Date	2014-04-03
Daily Attendance	Present

Class Absence(s)

Period	Course > CrsNo	Course > Description	Code
6	805m	Science 8	A

The **Daily Absence Alert** section shows the student's name, the date, and the attendance code entered when daily attendance was taken.

The **Class Absence(s)** section appears if your school also takes class attendance, and a student has at least one class attendance absence record for the current day. It displays the period number, class name, number, and attendance code for each period the student was marked absent.


Create Education Plan Alerts

Create Education Plan alerts when you create an education plan record, such as a 504 plan.

Note: Depending on your user role privileges, you may be able to create a student's education plan from the Student tab, Ed. Plans side-tab in the School, District, Staff, Health, and Special Education views. Family portal users may have view access to the plan.

To create an education plan record:

1. Log on to one of the following:

- School view
 - District view
 - Staff view
 - Health view
 - Build view
 - Special Education view
2. Click the Student tab.
 3. Search for and select the student.
 4. Click the Documents side-tab, and then click Ed. Plan.
 5. Click  to select the type of education plan, such as a 504 plan.
 6. Enter the required information.
 7. At the Status field, select Active.
 8. Click Save. After you save an active education plan, the alert for that education plan appears for the student. Your district can [determine the alert icon that appears for each education plan](#).

Determine the Alert Icon for an Education Plan

You can determine the alert icon that appears for education plans in your district.

To determine the alert icon for education plans:

1. Log on to the District view.
2. Click the **Admin** tab.
3. Click the **Data Dictionary** side-tab.
4. On the **Data Dictionary** side-tab, click **Extensions**.
5. Find and select the **STD-EPP-PLAN** extension.

Note: [Use a different extension to define the icon for a 504 plan.](#)


6. Select the **General Ed Plan** checkbox.
7. Click the **Icon** drop-down to select the icon. As you scroll through the list, the icon appears next to the field:

Managing Student Information

The screenshot shows the 'STD-EPP - Educational Proficiency Plan' form. The 'ID' field contains 'STD-EPP'. The 'Name' field contains 'Educational Proficiency Plan'. The 'Description' field contains 'Dictionary for the Standard Educational Profile'. The 'Category' dropdown is set to 'Student'. The 'Parent dictionary > Name' field is empty. The 'Health?' checkbox is unchecked. The 'Special Ed?' checkbox is unchecked. The 'PD?' checkbox is unchecked. The 'General Ed Plan?' checkbox is checked. The 'Icon' dropdown is set to 'Education Proficiency Plan'.

8. Click **Save**. The icon appears as an alert icon for students with an active education plan.


View an IEP Alert

On Student pages, the IEP Alert icon  appears next to a student's name if the student has an active IEP:

The screenshot shows the 'Student List' page for 'Adams, Tyler'. The 'Details' tab is active. The 'Demographics' section includes the following information:

First name *	Tyler	Gender	F
Middle name	William	Date of birth	5/19/1994 Age 17
Last name *	Adams	Phone 1	(781) 741-9506
Suffix		Phone 2	(617) 741-4799
Local identifier	224740	Phone 3	(413) 740-5673
State identifier	7817402679		

The 'School > Name' field contains 'Crow Point High School' and the 'Home language' field contains 'English'.

Click the IEP Alert icon  to view a summary of the student's IEP:

This summary information is NOT the entire Individualized Education Plan.

Name	Adams, Tyler
Start date	11/8/2010
End date	11/7/2011
IEP type	Re-evaluation
Ed. environment 6-21 (DOE34)	Full Inclusion
Case Manager > Name	Bragel, Lehrer

Accommodations

ContentArea	Category	Name	Description
No matching records			

Curriculum Accommodations

Needs Accommodations

Assessments Accommodations

Customize Other Alert Icons

The system contains over 150 icons you can use to represent Other alerts. You must add these icons to the Alert Icons reference table to make them available. This way, you can control the types of Other alerts users can create. Other alerts are grouped by the icons users select to represent them.

Users select the icon they want to use at the **Icon** drop-down when creating an Other alert.

To add icons to the Alert Icons reference table:

1. Log on to the District view.
2. Click the **Admin** tab.
3. Click the **Data Dictionary** side-tab.
4. On the **Data Dictionary** side-tab, click **Reference**. The list of system reference table appears.
5. Search for and select the **Miscellaneous Icons** reference table, and click **Codes** on the side-tab. The list of available icons appears:

Managing Student Information

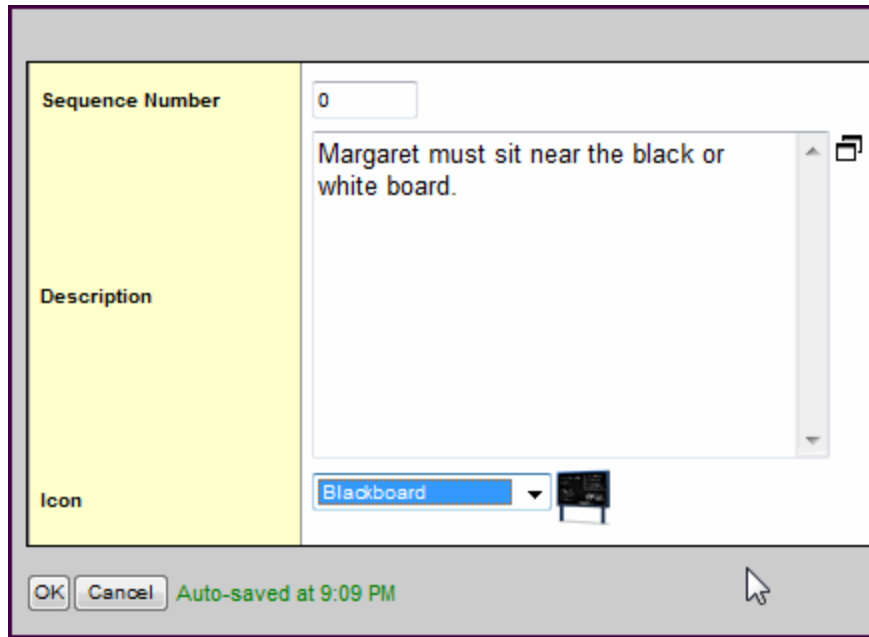
The screenshot shows the 'Reference Tables :: Miscellaneous Icons' page. The left sidebar contains navigation options: Users, Security, Tables, Extensions, Reference (with sub-options for Details, Codes, and Fields), Calculated Fields, Forms, Workflows, Widget Definitions, System Status, and Logs. The main area displays a table with the following columns: Code, Description, Local, State, Fed, Disabled, and NumericLevel. The table lists various icons such as 'achievement.png', 'admissions.png', 'agronomy.png', 'architecture.png', 'arts.png', 'art_class.png', 'attendance_list.png', 'backpack.png', 'biology.png', 'blackboard.png', 'calculator.png', 'chemistry.png', 'classmate.png', 'classroom.png', 'college.png', and 'computing.png'. The 'Disabled' column for all entries contains the letter 'N'. The top of the page includes a navigation bar with tabs for Pages, District, Student, Staff, Attendance, Conduct, Grades, Assessment, Schedule, Global, Tools, and Admin. Below the navigation bar are sections for Options, Reports, and Help, along with search and navigation icons.

Code	Description	Local	State	Fed	Disabled	NumericLevel
alerticons/br_achievement.png	Achievement				N	
alerticons/br_admissions.png	Admissions				N	
alerticons/br_agronomy.png	Agronomy				N	
alerticons/br_architecture.png	Architecture				N	
alerticons/br_arts.png	Arts				N	
alerticons/br_art_class.png	Art class				N	
alerticons/br_attendance_list.png	Attendance list				N	
alerticons/br_backpack2.png	Backpack				N	
alerticons/br_biology.png	Biology				N	
alerticons/br_blackboard.png	Blackboard				N	
alerticons/br_calculator.png	Calculator				N	
alerticons/br_chemistry.png	Chemistry				N	
alerticons/br_classmate.png	Classmate				N	
alerticons/br_classroom.png	Classroom				N	
alerticons/br_college.png	College				N	
alerticons/br_computing.png	Computing				N	

6. Copy and paste the name of the icon you want to add to your reference table for Other alert icons.
7. Click the **Reference** side-tab.
8. Search for and select the **Alert Icons** reference table, and click **Codes** on the side-tab.
9. On the **Options** menu, click **Add**. The New Reference Code page appears.
10. Type or paste the icon name in the **Code** field:

The screenshot shows the 'New Reference Code - Common' form for the 'Alert Icons' table. The left sidebar is the same as in the previous screenshot. The main area is a form with the following fields: Code (with a dropdown menu showing 'alerticons/br_blackboard.png'), Description, Local code, State code, Federal code, Dependent Code, System code, Disabled (checkbox), Sequence number (text box with '0'), Is a category? (checkbox), Category (dropdown menu), Template Context, and Localized Description 1. The top of the page includes the same navigation bar as the previous screenshot. Below the navigation bar are sections for Options, Reports, and Help, along with search and navigation icons.

11. In the **Description** field, type the name that describes this icon. This is the name that appears in the **Icon** drop-down menu when a user creates and Other alert.
12. Click **Save**. Now, this icon is available for users to select when they create an Other alert:



The screenshot shows a configuration window for a student alert. It has a yellow background on the left side with three labels: "Sequence Number", "Description", and "Icon".

- Sequence Number:** A text input field containing the number "0".
- Description:** A large text area containing the text "Margaret must sit near the black or white board." with a scroll bar on the right.
- Icon:** A dropdown menu showing "Blackboard" with a small icon of a blackboard to its right.















At the bottom of the window, there are three buttons: "OK", "Cancel", and "Auto-saved at 9:09 PM". A mouse cursor is visible near the bottom right corner.

Custom Alert Icons





When you create an Other Alert for a student, it is possible for your school to set up custom alert icons for users to choose from.














Note: Use Alert icons more creatively, such as a specific one for food allergies or transportation considerations. There are over 150 icons to choose from.















Code	Description	Icon
alertIcons/br_achievement.png	Achievement 1	
alertIcons/cl_achievement.png	Achievement 2	
alertIcons/br_admissions.png	Admissions 1	
alertIcons/cl_admissions.png	Admissions 2	
alertIcons/br_agronomy.png	Agronomy 1	
alertIcons/cl_agronomy.png	Agronomy 2	
alertIcons/br_architecture.png	Architecture 1	
alertIcons/cl_architecture.png	Architecture 2	
alertIcons/br_art_class.png	Art class 1	
alertIcons/cl_art_class.png	Art class 2	
alertIcons/br_arts.png	Arts 1	
alertIcons/cl_arts.png	Arts 2	
alertIcons/br_attendance_list.png	Attendance list 1	
alertIcons/cl_attendance_list.png	Attendance list 2	

Code	Description	Icon
alertIcons/br_backpack.png	Backpack A1	
alertIcons/cl_backpack2.png	Backpack A2	
alertIcons/br_backpack2.png	Backpack B1	
alertIcons/br_biology.png	Biology 1	
alertIcons/cl_biology.png	Biology 2	
alertIcons/br_blackboard.png	Blackboard 1	
alertIcons/cl_blackboard.png	Blackboard 2	
alertIcons/br_calculator.png	Calculator 1	
alertIcons/cl_calculator.png	Calculator 2	
alertIcons/br_chemistry.png	Chemistry 1	
alertIcons/cl_chemistry.png	Chemistry 2	
alertIcons/br_classmate.png	Classmate 1	
alertIcons/cl_classmate.png	Classmate 2	
alertIcons/br_college.png	College 1	

Code	Description	Icon
alertIcons/cl_college.png	College 2	
alertIcons/br_computing.png	Computing 1	
alertIcons/cl_computing.png	Computing 2	
alertIcons/br_desk.png	Desk 1	
alertIcons/cl_desk.png	Desk 2	
alertIcons/br_diplom.png	Diploma A1	
alertIcons/cl_diplom.png	Diploma A2	
alertIcons/br_diplom2.png	Diploma B1	
alertIcons/cl_diplom2.png	Diploma B2	
alertIcons/br_economics.png	Economics 1	
alertIcons/cl_economics.png	Economics 2	
alertIcons/br_electricity.png	Electricity 1	
alertIcons/cl_electricity.png	Electricity 2	
alertIcons/br_elementary_school.png	Elementary school 1	















Code	Description	Icon
alertIcons/cl_elementary_school.png	Elementary school 2	
alertIcons/br_engineering.png	Engineering 1	
alertIcons/cl_engineering.png	Engineering 2	
alertIcons/br_exam.png	Exam 1	
alertIcons/cl_exam.png	Exam 2	
alertIcons/br_e_learning.png	E Learning 1	
alertIcons/cl_e_learning.png	E Learning 2	
alertIcons/br_foreign_language.png	Foreign language 1	
alertIcons/cl_foreign_language.png	Foreign language 2	
alertIcons/br_forum.png	Forum 1	
alertIcons/cl_forum.png	Forum 2	
alertIcons/br_geography.png	Geography 1	
alertIcons/cl_geography.png	Geography 2	
alertIcons/br_geometry.png	Geometry 1	







Code	Description	Icon
alertIcons/cl_geometry.png	Geometry 2	
alertIcons/br_graduated.png	Graduated 1	
alertIcons/cl_graduated.png	Graduated 2	
alertIcons/br_graduation.png	Graduation 1	
alertIcons/cl_graduation.png	Graduation 2	
alertIcons/br_high_school.png	High School 1	
alertIcons/cl_high_school.png	High School 2	
alertIcons/br_history.png	History 1	
alertIcons/cl_history.png	History 2	
alertIcons/br_homework.png	Homework 1	
alertIcons/cl_homework.png	Homework 2	
alertIcons/br_ink.png	Ink 1	
alertIcons/cl_ink.png	Ink 2	
alertIcons/br_kindergarden.png	Kindergarten 1	











Code	Description	Icon
alertIcons/cl_kindergarden.png	Kindergarten 2	
alertIcons/br_laboratory.png	Laboratory 1	
alertIcons/cl_laboratory.png	Laboratory 2	
alertIcons/br_laws.png	Laws 1	
alertIcons/cl_laws.png	Laws 2	
alertIcons/br_lesson_planning.png	Lesson Planning 1	
alertIcons/cl_lesson_planning.png	Lesson Planning 2	
alertIcons/br_library.png	Library 1	
alertIcons/cl_library.png	Library 2	
alertIcons/br_locker.png	Locker A1	
alertIcons/cl_locker.png	Locker A2	
alertIcons/br_locker2.png	Locker B1	
alertIcons/cl_locker2.png	Locker B2	
alertIcons/br_maths.png	Math 1	

Code	Description	Icon
alertIcons/cl_maths.png	Math 2	
alertIcons/br_middle_school.png	Middle school 1	
alertIcons/cl_middle_school.png	Middle school 2	
alertIcons/br_music.png	Music 1	
alertIcons/cl_music.png	Music 2	
alertIcons/br_nursery.png	Nurse 1	
alertIcons/cl_nursery.png	Nurse 2	
alertIcons/br_parent_coordinator.png	Parent coordinator 1	
alertIcons/cl_parent_coordinator.png	Parent coordinator 2	
alertIcons/br_physical_education.png	Physical education 1	
alertIcons/cl_physical_education.png	Physical education 2	
alertIcons/br_physical_sciences.png	Physical sciences 1	
alertIcons/cl_physical_sciences.png	Physical sciences 2	
alertIcons/br_pre_schools.png	Pre schools 1	

Code	Description	Icon
alertIcons/cl_pre_schools.png	Pre schools 2	
alertIcons/br_project.png	Project 1	
alertIcons/cl_project.png	Project 2	
alertIcons/br_recreation.png	Recreation 1	
alertIcons/cl_recreation.png	Recreation 2	
alertIcons/br_schedule.png	Schedule 1	
alertIcons/cl_schedule.png	Schedule 2	
alertIcons/br_school.png	School 1	
alertIcons/cl_school.png	School 2	
alertIcons/br_school_events.png	School events 1	
alertIcons/cl_school_events.png	School events 2	
alertIcons/br_scientific_calculator.png	Scientific calculator 1	
alertIcons/cl_scientific_calculator.png	Scientific calculator 2	
alertIcons/br_skills.png	Skills 1	

Code	Description	Icon
alertIcons/cl_skills.png	Skills 2	
alertIcons/br_social_studies.png	Social studies 1	
alertIcons/cl_social_studies.png	Social studies 2	
alertIcons/br_stethoscope.png	Stethoscope 1	
alertIcons/cl_stethoscope.png	Stethoscope 2	
alertIcons/br_student1.png	Student A1	
alertIcons/br_student2.png	Student A2	
alertIcons/cl_student2.png	Student A3	
alertIcons/br_student3.png	Student A3	
alertIcons/cl_student3.png	Student B3	
alertIcons/cl_student4.png	Student B4	
alertIcons/br_study.png	Study 1	
alertIcons/cl_study.png	Study 2	
alertIcons/br_subject.png	Subject 1	

Code	Description	Icon
alertIcons/cl_subject.png	Subject 2	
alertIcons/br_teacher.png	Teacher 1	
alertIcons/cl_teacher.png	Teacher 2	
alertIcons/br_teacher_day.png	Teacher Day 1	
alertIcons/cl_teacher_day.png	Teacher Day 2	
alertIcons/br_technology.png	Technology 1	
alertIcons/cl_technology.png	Technology 2	
alertIcons/br_training.png	Training 1	
alertIcons/cl_training.png	Training 2	
alertIcons/br_transportation_service.png	Transportation service 1	
alertIcons/br_transportation_service.png	Transportation Service 2	
alertIcons/br_tutorial.png	Tutorial 1	
alertIcons/cl_tutorial.png	Tutorial 2	
alertIcons/br_university.png	University A1	



Code	Description	Icon
alertIcons/cl_university.png	University B1	
alertIcons/br_university2.png	University A2	
alertIcons/cl_university2.png	University B2	
alertIcons/br_veterinary.png	Veterinary 1	
alertIcons/cl_veterinary.png	Veterinary 2	
alertIcons/br_virtual_course.png	Virtual course 1	
alertIcons/cl_virtual_course.png	Virtual course 2	
alertIcons/br_whiteboard.png	Whiteboard 1	
alertIcons/cl_whiteboard.png	Whiteboard 1	
alertIcons/br_whiteboardmarker.png	Whiteboard marker 1	
alertIcons/cl_whiteboardmarker.png	Whiteboard marker 2	

Entering and Viewing Student Details


Enter or view details such as address, year of graduation, homeroom, or activities for each student.

To enter or view details for a student:

1. Log on to the District, School, or Staff view.
2. Click the **Student** tab.
3. [Search for and select the student.](#)

4. Click the **Details** side-tab. The Details page for that student displays the **Demographics, Addresses, Activities, Alerts,** and **Photo** sub-tabs.
5. On the **Addresses** sub-tab, at the **Address line 1** field, do the following:
 - Type an address.
 - To use the optional validation tool to ensure the address is entered in the correct format, click  to validate the format of the address.
 - Click  to select an address already in the district. If you select an address shared by another person in the district, the Shared Address pop-up displays the people the address is shared with. This will list students, staff, contacts, or any person. It can also be a family address. Selecting an address shares this address between the students and other people at that address, and joins this student to a family with the others at this address. If either already has a family, that family is used. Otherwise, the system creates a new family for both.

Note: If you change a physical address that is shared, the 'You are changing a shared physical address' pop-up appears after you click **Save**. If you change a mailing address that is shared, the 'You are changing a shared mailing address' pop-up appears after you click **Save**. Click **Add All**, or select a name and click **Add** to add the people that share the original address to the new address:


You are changing a shared physical address 

Please review the list of people sharing the old address and **Add** those whose address should also be changed to the new address.

<p style="background-color: #ffffcc; margin: 0; padding: 2px;">Old physical address:</p> <p style="margin: 5px 0;">37 Bruce Dr Hingham, MA 02043</p> <div style="border: 1px solid gray; padding: 2px; font-size: x-small;"> Adams, Laura (Student) Adams, Josephine (Student) Adams, Margaret Ann (Contact) </div>	<div style="border: 1px solid gray; padding: 2px; margin-bottom: 5px;">Add All >></div> <div style="border: 1px solid gray; padding: 2px; margin-bottom: 5px;">Add >></div> <div style="border: 1px dashed gray; padding: 2px; margin-bottom: 5px;"><< Remove</div>	<p style="background-color: #ffffcc; margin: 0; padding: 2px;">New physical address:</p> <p style="margin: 5px 0;">Adams, Tyler John 74 Bay 1307 Hingham, MA 02043</p> <div style="border: 1px solid gray; padding: 2px; font-size: x-small;"> Adkerman, James Cameron (Student) </div>
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If you change an address, the address is listed in the Address Changes widget in the School view for all schools with students that share that address.

Note: In order for the address changes to be listed on the Home page, the audit trail must be enabled for the Address table and all its fields.

- Click the **Shared Address** icon  to view who this address is shared with. Confirm that the people listed with the address are correct. You can click **Clear** to delete this address for the current student, or you can click **Detach** to make a copy of the address for this student, separating the student from others who share it.
An **X** appears over the shared address icon to indicate that an address is not shared.
6. You can [import the student's photo](#) on the **Photo** sub-tab.
 7. Click each sub-tab, and enter or view the information.

Note: You do not have to save the information you enter on each sub-tab. For example, you can enter a student's demographics, then go to the **Activities** sub-tab and enter that information. When you click **Save** on the **Activities** sub-tab, the information you entered on both the **Activities** and **Demographics** sub-tabs is saved.

8. Click **Save**.

Protect Student Demographic Information

Sometimes, a student has special circumstances that must be kept private. For instance, you might not want another school to view the demographic information of a student who is currently in a youth custody center.

In these situations, you can flag an active student as "private". That way, the student's demographic information will not appear in a student search at a school or district that is not associated with that student.

Note: The private student flag must be enabled in your district's . See your Aspen system administrator for details.

To flag a student as "private":

1. Log on to the District or School view.
2. Click the **Student** tab.
3. Search for and select the student.
4. Click the **Details** side-tab. The details page for that student displays the Demographics, Addresses, Activities, and Photo sub-tabs.
5. Click the **Demographics** sub-tab.
6. Select the **Private** checkbox.
7. Click **Save**.

If a private student is cross-enrolled at a secondary school, users at that school and district can view the student's information. The student must be associated with the secondary school before

he or she is marked private; otherwise, the private flag will prevent the secondary school from finding them in Aspen and enrolling them.

If a cross-enrolled private student withdraws from their primary or secondary school, they are still marked private at the school they still attend.

Note: Students marked private will not appear in the search results when searching for a related student in the Student Registration wizard.

View Changes to Student Demographic Information

If a new student enrolls in your school, or a staff member changes audited demographic information on a student's record, Aspen lists the changes on the Student Changes widget on your School view's Home page. (The Root Organization specifies which student fields can be audited in the Data Dictionary.)

Note: To view the Student Changes widget, your user role must have the appropriate privileges, and you need to set your user preferences.

To use the Student Changes widget on the Home page:

At the **Choose a time period** drop-down, select one of the following to determine how many records you want to view:

- **Today**
- **Last 7 days**
- **Last 30 days**
- **Last 60 days**

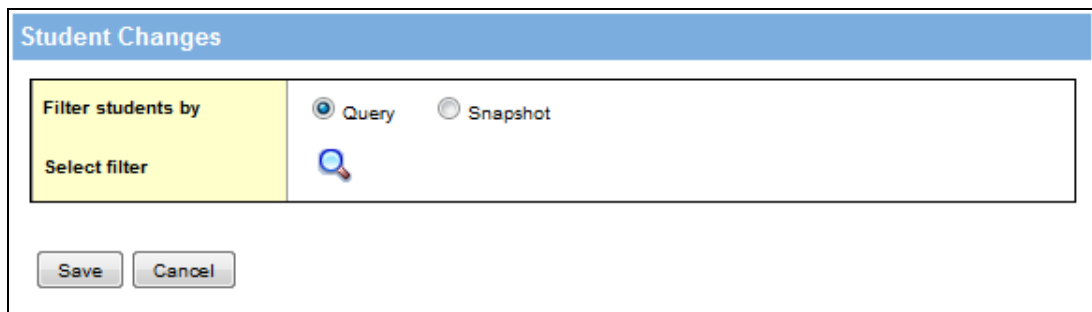
Student Changes Edit				
<div style="border: 1px solid #ccc; display: inline-block; padding: 2px;">Today ▼</div>				
LASID	Student	Field	Date/Time Changed	Changed By
2018065042	Aldred, Alana	Athletic Emergency Form Winter,...	(4)03/04/2014 9:20 AM	System, Admin
2018040108	Barresi, Julia	Enrollment status	03/04/2014 9:02 AM	Support, Aspen
2018040108	Barresi, Julia	Enrollment status	03/04/2014 8:50 AM	Support, Aspen


For each change, the following appears:

- **LASID**
- **Student:** Click the student's name and a pop-up appears, listing the user who changed the record, the type of change, the date and time it was made, the field changed, and its previous and current values.
- **Field**
- **Date/Time Changed**
- **Changed By:** Click the user name to view the details of who changed the record, including their school and school phone number.

To customize how the student changes appear:


1. Click **Edit** at the top of the Student Changes widget. The Student Changes page appears:




2. At the **Filter students by** field, you can select **Query** or **Snapshot** if you want to view changes for specific students only. For example, a guidance counselor might create a snapshot of his or her students to watch for address changes.
3. At the **Select filter** field, click  to select the query or snapshot you want to filter by, if any.
4. Click **Save**.

Create Medical, Legal, and Other Alerts

Use alerts to let users know about a student's legal situation, medical condition, or any other

information users should know about a student. After you enter an alert, the **Legal Alert**  or

Medical Alert  icon appears next to the student's name on the Student pages in Aspen. Only users with appropriate privileges can see these icons.


Notes:

- You can also create Other alerts to let users know about any other important information pertaining to a student.
- At the end of every school year, make it a point to clean up your student alerts, as these stay on the student's record until manually deleted.

To enter Medical, Legal, or Other Alerts:

1. Log on to the District or School view.
2. Click the **Student** tab.
3. [Search for and select the student.](#)
4. Click the **Details** side-tab. The Details page for that student appears.
5. Click the **Alerts** sub-tab. The page displays any Legal, Medical, or Other alerts already created for the student:

The screenshot shows the 'Alerts' sub-tab for a student named Abigail Adams. The interface includes a navigation menu on the left with options like 'Details', 'Contacts', 'Attendance', etc. The main content area is divided into three sections: 'Legal', 'Medical', and 'Other'. Each section has a table with columns for 'SeqNo' and 'Description'. The 'Medical' section has two entries: one with SeqNo 0 and description 'Grace is prone to nose bleeds', and another with SeqNo 1 and description 'Grace is allergic to peanuts'. Each entry has a sequence icon (three horizontal bars) next to the SeqNo. Below each table are 'Add' and 'Delete' buttons. At the top of the Alerts section, there are 'Save' and 'Cancel' buttons and a 'Default Template' dropdown.

Note: When there is more than one alert under a field, click and drag the **Sequence Icon**  to change the order in which they appear.

6. Do one or more of the following:
 - Click **Add** below **Legal** to add a Legal alert.
 - Click **Add** below **Medical** to add a Medical alert.
 - Click **Add** below **Other** to add an Other alert.

The appropriate dialog box appears.

7. Type the **Sequence Number** for the alert you are creating.

Note: This number only applies to the category you are working in. For example, if you have more than one Legal alert, you can determine the order they are listed in (lowest number appears first). However, you cannot use the **Sequence Number** field to put a Medical alert before a Legal alert.

8. Type a **Description** of the alert.

Note: If you create an Other alert, click the **Icon** drop-down to select the icon you want to use to represent this alert for this student. The system groups alerts that use the same icon in the breadcrumbs.

9. Click **Save**. The system displays the appropriate icon next to the student's name.
10. To view the alert, click the icon.

Import Student Photos

You can include student photos in the students' details. Either add photos one by one, or import all student photos at the same time (such as after you receive a disk of photos from the photographer).

Note: You can also import photos for staff members on the Staff tab, and for users on the Admin tab, Users side-tab.

[Click here](#) for troubleshooting tips.

To import an individual student's photo:

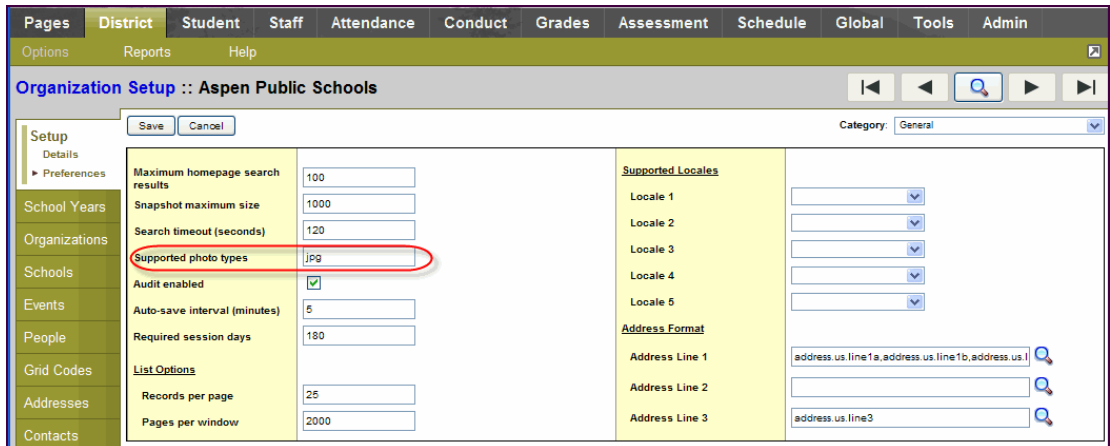
1. Log on to the School view.
2. Click the **Student** tab, and search for and select the student.
3. Click the **Details** side-tab.
4. Click the **Photo** sub-tab.
5. Click **Import**.
6. Find and select the photo.
7. Click **Save**.

To import all student photos:

1. Log on to the School view.
2. Click the **Student** tab.
3. On the **Options** menu, click **Import Photos**. The Import Photos dialog box appears.
4. Click **Browse** to find the zip file containing the photos.
5. At the **Filenames based on** field, select if you want the system to match photos to student records by LASIDs, SASIDs, or personal identifiers (such as Social Security numbers).
6. Click **OK**.

If you're having trouble importing photos of students or staff into Aspen, check the following:

- The district preferences should list the file type(s) of the photos that you are importing.
1. Log on to the District view.
 2. Click the **District** tab.
 3. On the **Setup** side-tab, click **Preferences**. The general preferences page appears:



4. At the Supported photo types field, confirm that the photo file type(s) you are importing are listed here. The default photo type value is set to jpg. You can import only images of the types that are entered here.

Note: Enter the types in the order you import most frequently. Separate each file type with a comma. For example, you might type **jpg, gif, bmp, mpg**.

- **The photo files must be stored directly in a zip file, not in a directory within the zip file.**
 - If the photos do not import, they might exist in a directory within the zip file. For example, the zip file called **studentphotos.zip** might contain a directory called **Seniors**, which contains all the senior students' photo files. These photo files should be zipped without putting them in a directory.
 - The zip file should only contain image files.
 - Each photo file within the zip file should be named based on a student/staff identifier field.
 - The photo files can be named based on the LASID, SASID, or MEPID. When importing multiple students' photos, this identifier needs to match the selection in the **Import Photos** dialog box:
5. Log on to the School view.
 6. Click the **Student** tab.
 7. On the **Options** menu, click **Import Photos**. The Import Photos dialog box appears:



- At the **Filenames based on** field, select the identifier the photo file is named so the system can match the photos to the student records by the identifier.

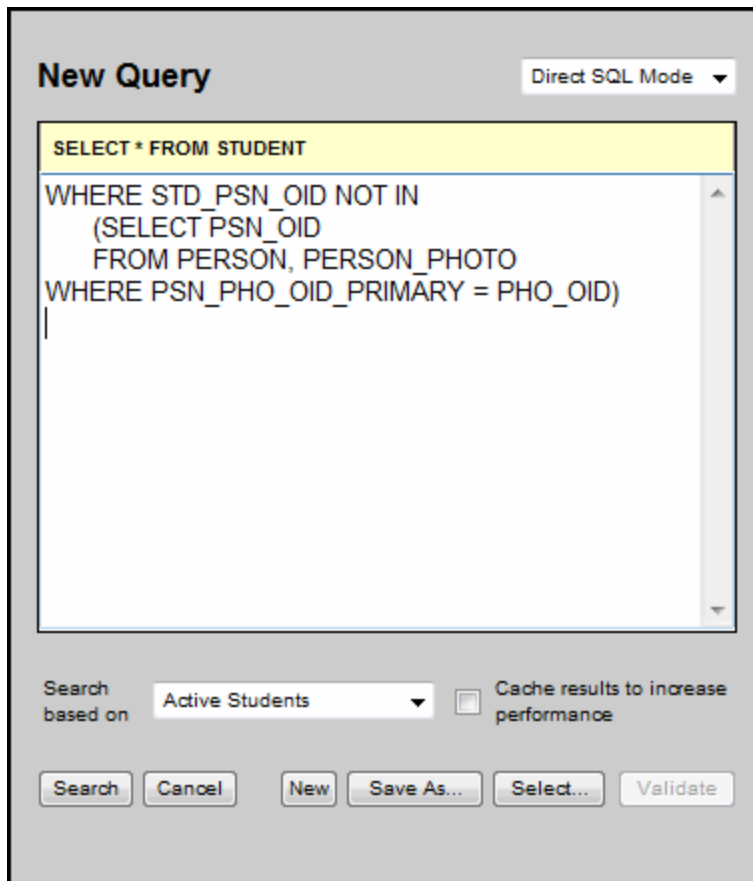
You can easily [find all students or staff in your district or school who do not have a photo in their Aspen record by using a query.](#)

Search for Students or Staff Without Photos

You can easily find all students or staff in your district or school who do not have a photo in their Aspen record by using a query.

To search for students or staff without a photo in their Aspen record:

- Log on to the District, Intermediate Organization , or School view.
- Click the **Student** tab.
- From the **Options** menu, click **Query**.
- In the upper-right corner drop-down, select **Direct SQL Mode**:



- Under **SELECT * FROM STUDENT**, copy and paste one of the following queries in the field:

To find students without photos:

```
WHERE STD_PSN_OID NOT IN
```

```
(SELECT PSN_OID
FROM PERSON, PERSON_PHOTO
WHERE PSN_PHO_OID_PRIMARY =
```

To find staff without photos:

```
WHERE STF_PSN_OID NOT IN
(SELECT PSN_OID
FROM PERSON, PERSON_PHOTO
WHERE PSN_PHO_OID_PRIMARY =
```

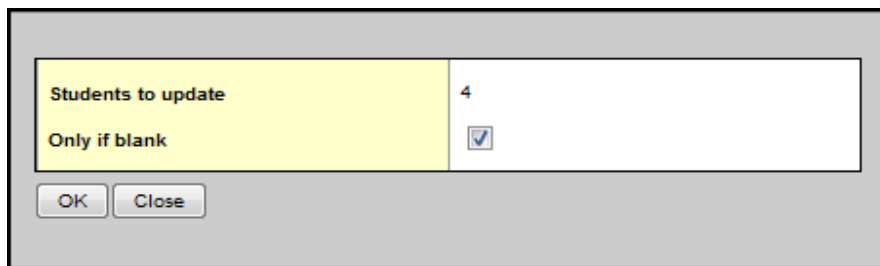
6. Click **Save As**.
7. In the **Save As** dialog box, enter a **Name** for the query.
8. Click **Save**.
9. Click **Search**. The query can now be run from the **Student** tab.

Assign Next School for Students

In the District view, automatically assign students to schools for the next school year. The system uses a student's grade level, and address grid code, if enabled in your system.

To assign next schools for students:

1. Log on to the District view.
2. Click the **Students** tab.
3. Select the students you want to assign next schools for.
4. On the **Options** menu, click **Show Selected**.
5. On the **Options** menu, click **Assign Next School**. The Assign Next School dialog box appears:



The number of students to update, based on the students you selected, appears.

6. Select the **Only if blank** checkbox if you want the system to assign a next school for students whose **Next School Name** fields are blank.

Managing Student Information

7. Select the **Reset grid code variances** checkbox if you want the system to update the values in the selected students' **Next School Name** fields based on their address grid codes, regardless of their current schools.

Note:Your Aspen system administrator must have grid codes enabled in your system, grid codes associated with student addresses, and schools associated with those codes and addresses.

8. Click **OK**.

Enter or View Student Contact Information

Enter or view contact information for each student.

It's best to enter the contact information, and when applicable, share the contact among students when first entering a student's details. If it's not possible, you can always enter and share the contact at a later time.


To enter or view contact information for a student:

1. Log on to the District, School, Staff, or Health view.
2. Click the **Student** tab.
3. Search for and select the student .
4. Click the **Contacts** side-tab. The student's Contacts page appears.
5. Do one of the following:
 - To view information for an existing contact, select the contact, and click **Details** on the **Contacts** side-tab.
 - To add a new contact, on the **Options** menu, click **Add**. The New Student Contact page appears:

The screenshot shows the 'Student Contact Information' form for a student named Aaronson, Dalene. The form is divided into several sections: 'General', 'Address', 'Shared Contact Information', and 'Membership'. The 'General' section includes fields for First name (Dalene), Middle name (Angela), Last name (Aaronson), Emergency priority (0), and Relationship (Mother). The 'Address' section includes a checkbox for 'Contact lives with student' (checked) and checkboxes for 'Receive grade mailing', 'Receive conduct mailing', 'Receive other mailing', and 'Receive email'. The 'Shared Contact Information' section includes a dropdown for Suffix, a dropdown for Gender, a date field for Date of birth (8/23/1995), and three phone number fields (Phone 1: (781) 741-7953, Phone 2: (800) 749-1944, Phone 3: (781) 749-1059). The 'Membership' section includes a dropdown for Suffix. The form has 'Save' and 'Cancel' buttons at the bottom.

6. In the **Last Name** field, type a contact name. If the contact name already exists in the system, a pick list with the matching name(s) appears.
7. If you select a contact already entered for another student, the contact is shared. The information that is shared for that contact automatically appears in the **Shared Contact** portion of the page.

If you update or edit this shared contact information, the system updates the information for all students who share that contact.

8. Click  to see the other students associated with this contact. Click **Clear** to stop sharing this contact with other students.
9. Customize your preferences for the contact with the following fields:

Reference table	Description
Emergency priority	Enter a number to indicate the contact's priority. 0 is considered the highest priority. In case of an emergency, the contact with an emergency priority of 0 will be contacted first, 1 will be contacted second, and so on.
Relationship	Click this drop-down and select the contact's relation to the student.
Contact lives with student	Select this checkbox if the contact lives with the student.
Receive grade mailing	Select this checkbox if the contact is mailed the student's grades.
Receive conduct mailing	Select the checkbox if the contact is mailed the student's conduct incidents.
Receive other mailing	Select this checkbox if the contact is mailed some other notification regarding the student.
Receive email	Select this checkbox if the contact receives emails.

10. Click **Save**.

Note: In the Staff view, you can only view, not edit, contact information.


Important: Your system might have duplicate records for contacts. If so, you must identify the records that are duplicates, and use the Merge Contacts procedure to combine the duplicate contact records you have identified in your system.

For example, Leah Abraham, a parent of two children in the district, has two separate person records since she is a contact for her two children. Instead of having two contact records for Leah Abraham, use this procedure to merge her two records into one.

View a Student's Current Location

If your school's schedule is built with your school's bell schedule, your users can view a student's Quick Status on the Student List or in the gradebook.

To view a student's Quick Status:

- Do one of the following:
 - Log on to the District, School, Special Education, or Health view. Click the **Student** tab. Select a student.
 - Log on to the Staff view. Click the **Gradebook** tab, select a class, and click the **Scores** side-tab. On the **Scores** side-tab, click a student's name.
- Click the **Quick Status Alert** icon  next to the student's name. The Quick Status dialog box appears:

Student	Adam, Kathleen
Time	6/25/2008, 8:26 AM
Current period A [8:00 AM - 9:30 AM]	
Class	15823-0003 - Standard Biology Jr/Sr
Teacher	Bardan, Yenitza
Location	060 @ Crow Point High School North
Next period B [9:30 AM - 11:00 AM]	
Class	16211-0004 - Algebra I
Teacher	Barbosa, Filomena
Location	353 @ Crow Point High School North
Daily attendance	A (3)
Year-to-date attendance	
Unexcused absences	10
Excused absences	0
Tardies	26
Term-to-date attendance Term 4	
Unexcused absences	1
Excused absences	0
Tardies	2
<input type="button" value="Cancel"/>	

The student's name and current date and time appear.

Then, the student's current class information appears, including class name, teacher, and location. The student's next class information also appears. If you check a student's status during a class period that overlaps with another, the box displays a drop-down menu. Select the class you want to view.

Note: If your school built a schedule without bell schedules, the system cannot display current and next class information.

At the bottom, the box displays a summary of the student's attendance, including:

- Today's attendance, if any. If the student has been absent for multiple days in a row, the number of consecutive absences displays next to the code. For example, if the student is absent for the third consecutive day, **A(3)** appears next to **Daily Attendance**.
- Year-to-date attendance, including unexcused absences, excused absences, and tardies
- Term-to-date attendance, including unexcused absences, excused absences, and tardies

Enter or View Class Attendance on the Student Tab

To enter or view daily attendance for a specific student on the Student tab:

1. In the District, School, Staff, or Health view, click the **Student** tab. The Student List displays the list of students at your school.
2. Find and select the student you want to enter or view an attendance record for.
3. Click the **Attendance** side-tab, then click **Daily Attendance** or **Class Attendance**. A list of the student's attendance records appears.
 - Click an attendance record to view its details.

Note: You cannot add, edit, or delete daily attendance records on the **Student** tab in the Staff view. Teachers can only view this information on the **Student** tab, **Daily Attendance** side-tab.

Enter or View Conduct Incident for Specific Student

You can view, edit, or enter a conduct incident for a specific student:

- from the **Home** page; or
- on the Student tab.

To view, edit, or enter an incident for a specific student from the Student tab:

1. Log on to the School, Staff, or Health view.

Note: In the Staff view, you can only view conduct incidents for your students.

2. Click the **Student** tab.
3. Search for and select the student.
4. Click the **Conduct** side-tab, then click **Incidents**. A list of any conduct incidents entered for the student appears.
5. Do one of the following:

- Click the value in the **Code** column to view the details of a conduct incident.
- On the **Options** menu, click **Add**. The New Student Conduct Incident page appears. Enter the conduct incident. Then, click the **Actions** sub-tab to enter any actions. *Be sure to click **Save**, or your entry will be lost.*

Entering and Viewing Transcript Information

Depending on your user role privileges, you might be able to view and edit student grades after they have been posted to transcripts.

You can also [promote a student mid-year](#), and [create a record for a transfer course](#).


To view and edit posted student grades:

1. Log on to the District, School, Build, or Staff view.

Note: You cannot make edits to grades on the Transcript tab in the Build view.

2. Click the **Student** tab.
3. Select the checkbox next to the student's name.
4. Click the **Transcript** side-tab. The Transcript page displays a record for each course grade, each school year:

Year	Grade	Course Desc	Final	Credit	Field
2011	11	SAT Prep Eng	76.8	0.25	FIELD039
2011	11	American Literature C	80.3	1.0	
2011	11	Writing Seminar	76.3	0.5	
2011	11	American Studies 2 C	79	1.0	
2011	11	Pre Calculus/Trig H	88.2	1.0	
2011	11	Chemistry C & Lab	88	1.0	
2011	11	Concert Choir	90	1.0	
2011	11	Academic Support 11-12 E	79	0.5	

Note: Notice the **Dictionary** icon  in the upper-right corner of the page. Click this icon to select a different transcript definition. By default, all transcript definitions appear.

5. Select a record.
6. On the **Transcript** side-tab, click **Details**. The first section of the page displays the details of the course:

Note: Use the Update checkboxes to determine if and how the system automatically updates calculated grades, GPAs, rank, and credits for students if you change a grade.

Promoting a student mid-year

If you are promoting a student mid-year, the system determines which transcript records should appear with which grade levels on the transcript, based on the student's promotion date. For example, if you promote a student from grade 11 to grade 12 after Semester 1, the student's posted grades for Semester 1 should appear for grade 11 on his or her transcript. Semester 2 grades would appear for grade 12.


If there is an exception, and you need to manually align the transcript records to appear for the correct grade level, select the transcript record, and select the **Override** checkbox next to "Grade level". The "Grade level" field displays a drop-down:

Select the grade level you want the grades that currently exist for this course to appear for on the transcript. Then, any subsequent grades posted after the student's promotion date will appear with the student's new grade level.


Creating a record for a transfer course

If you are creating a record for a transfer course, go to the second section of the page.

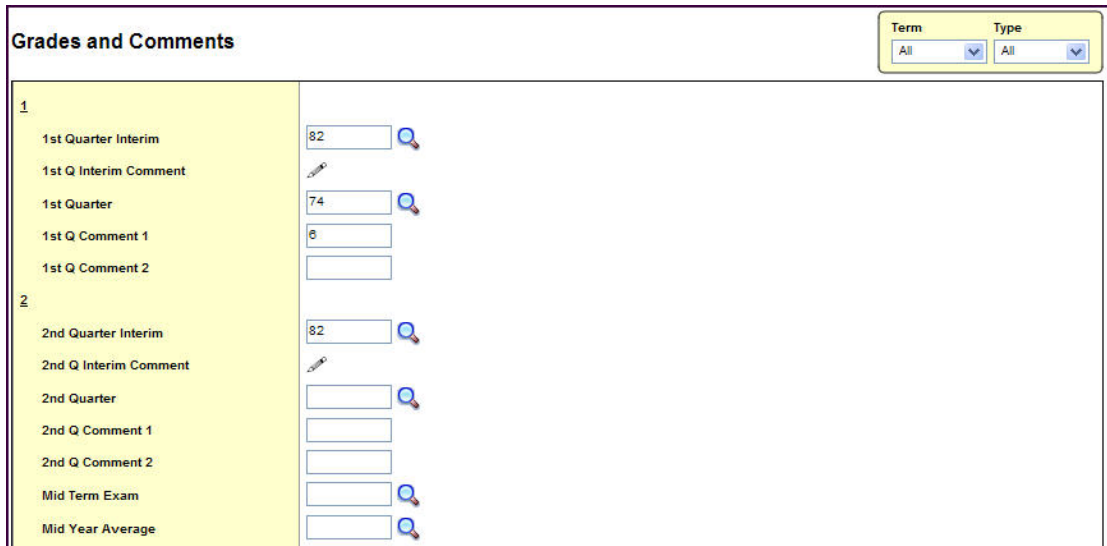
Select the **User description** checkbox to specify the detailed course description for the record.



Click  at the **Equivalent Course** field to select a course from the current course catalog that is most similar to the transferred course.


The system treats this record as the equivalent course when it calculates a student's graduation status.

Note: If you manually adjust the value in the **Credit** field, the system displays the **Adjusted** icon . If your school auto-calculates credits through the Transcript page and you manually adjust a credit value, the system removes the **Update Credits** checkbox at the top of the page and does not recalculate the credits upon saving the page. To allow auto-calculation of an adjusted value, delete any value in the **Credit** field, and save the record.

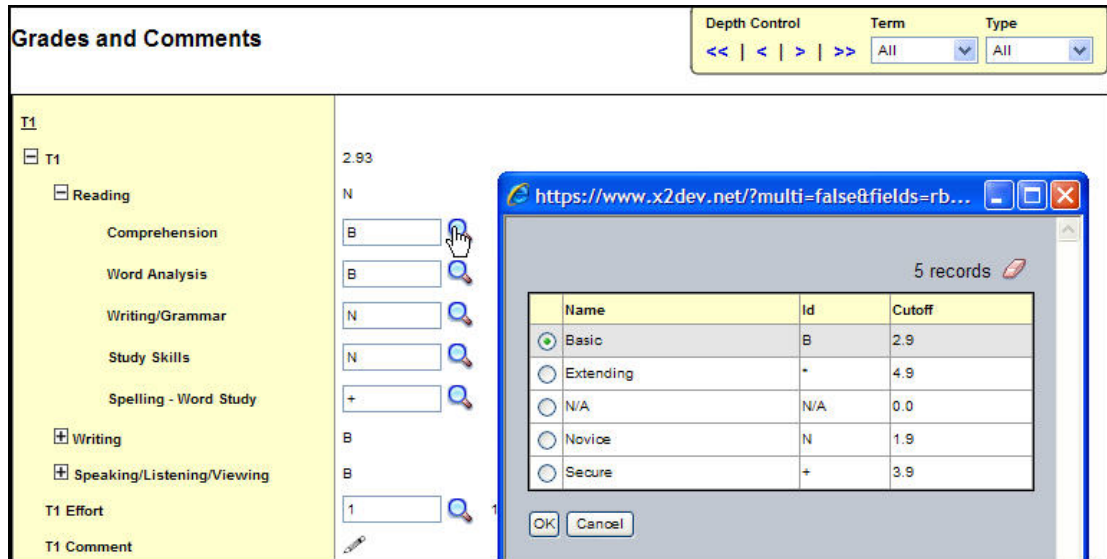
The Grades and Comments section of the page displays a list of the grades and transcript information the student earned in the course:




Grades and Comments		Term	Type
		All	All
1			
1st Quarter Interim	82		
1st Q Interim Comment			
1st Quarter	74		
1st Q Comment 1	6		
1st Q Comment 2			
2			
2nd Quarter Interim	82		
2nd Q Interim Comment			
2nd Quarter			
2nd Q Comment 1			
2nd Q Comment 2			
Mid Term Exam			
Mid Year Average			

7. On the right side of the page, filter the information that appears by **Term** and **Type** (term or progress).
8. Edit the grades and comments, as needed. Click  to select a grade from the grade scale, or a comment. If a comment column is a text comment, click on the first few words in the comment to edit it.

Note: If a student's transcript contains rubric grades, you can expand and collapse the rubric criteria to edit or enter the grades:



9. Enter or edit any information on the page. In the Staff view, you can only view a student's transcript.

Note: If you manually adjust a calculated average, the system displays the **Adjusted** icon  next to the grade.

10. Click **Save**.

Note: If you auto-calculate GPAs or rank and no users have run the Grade Point Averages report, any edits to a student's grade on the Transcript page will be saved. However, the student's GPA and rank are not updated until the report is run.

Note: If you edit a student's grade and select both the "Update GPA" and "Update Rank" checkboxes, the system recalculates the student's GPA and updates the rank of all students in his or her year of graduation when you click Save. This can cause moderate wait times, depending on how many students are in that year of graduation.



To avoid this issue, if allowed by your Aspen system administrator, select just the "Update GPA" checkbox when altering a student's transcript grade. You can then update student ranks at a later time. This can be useful when modifying transcript grades for multiple students in the same year of graduation.

View and Adjust a Student's Credit Summary

You can view an individual student's credit summary, including how many credits he or she earned each year in your school, and any adjusted credits.

You can also adjust credits for the student.

To view a student's credit summary:

1. Log on to the District or School view.
2. Click the **Student** tab, and search for and select the student.
3. Click the **Transcript** side-tab, then click **Credit Summary**. The student's credit summary appears. For each year and grade level, the page displays the number of credits that appear on the student's transcripts, the number of manually adjusted credits, and the total number of credits the student earned that year.
4. To manually adjust the total number of credits in a year, click  in the **Adjusted Credits** column header. Enter the adjusted value, and click .

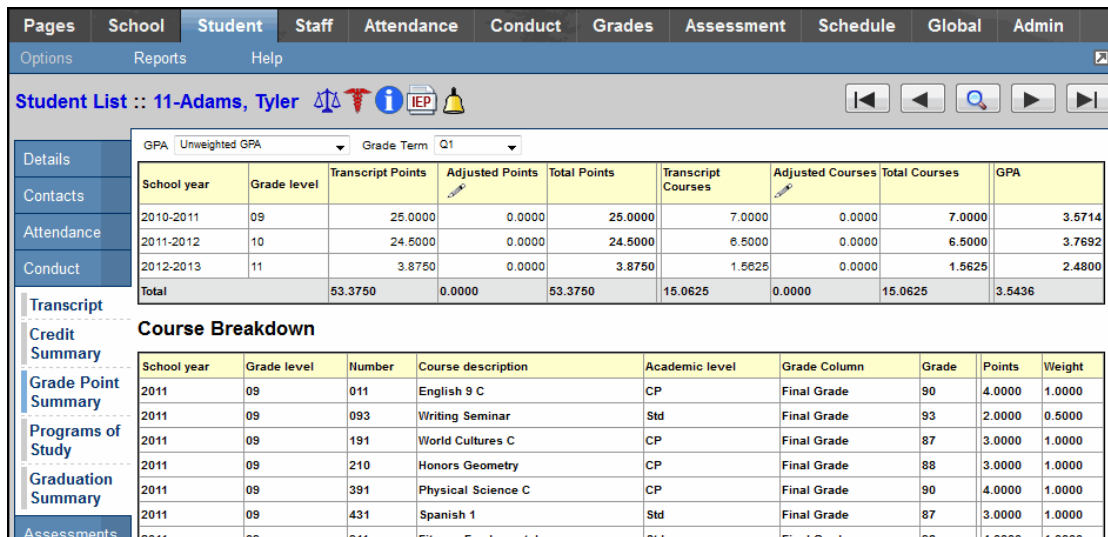
Note: Using the **Grades** tab, you can enter adjusted credits for several students from the same side-tab.

View and Adjust a Student's Grade Point Summary

You can view the summary of a student's GPA to see how the GPA is calculated.

To view a student's grade point summary:

1. Log on to the District or School view.
2. Click the **Student** tab, and search for and select the student.
3. Click the **Transcript** side-tab, then click **Grade Point Summary**. The student's grade point summary appears:



The screenshot shows the 'Student List' for Tyler Adams, 11th grade. The 'Grade Point Summary' section is active, displaying a table with columns for School year, Grade level, Transcript Points, Adjusted Points, Total Points, Transcript Courses, Adjusted Courses, Total Courses, and GPA. Below this is a 'Course Breakdown' table with columns for School year, Grade level, Number, Course description, Academic level, Grade Column, Grade, Points, and Weight.

School year	Grade level	Transcript Points	Adjusted Points	Total Points	Transcript Courses	Adjusted Courses	Total Courses	GPA
2010-2011	09	25.0000	0.0000	25.0000	7.0000	0.0000	7.0000	3.5714
2011-2012	10	24.5000	0.0000	24.5000	6.5000	0.0000	6.5000	3.7692
2012-2013	11	3.8750	0.0000	3.8750	1.5625	0.0000	1.5625	2.4800
Total		53.3750	0.0000	53.3750	15.0625	0.0000	15.0625	3.5436




School year	Grade level	Number	Course description	Academic level	Grade Column	Grade	Points	Weight
2011	09	011	English 9 C	CP	Final Grade	90	4.0000	1.0000
2011	09	093	Writing Seminar	Std	Final Grade	93	2.0000	0.5000
2011	09	191	World Cultures C	CP	Final Grade	87	3.0000	1.0000
2011	09	210	Honors Geometry	CP	Final Grade	88	3.0000	1.0000
2011	09	391	Physical Science C	CP	Final Grade	90	4.0000	1.0000
2011	09	431	Spanish 1	Std	Final Grade	87	3.0000	1.0000

4. At the top of the page, select the GPA and the grade term as of which you want to view GPA information.

The system calculates a basic GPA by adding the total points a student earns and dividing that by the total number of courses the student completed (GPA = Total Points/Total

Courses.) Therefore, for each school year, the page displays two sections of information that the system uses to calculate the student's GPA for that year.

The first section displays the number of points the student earned on his or her transcript, any adjusted points, and total points. The other half of the row displays the number of transcript courses, any adjusted courses, and the total number of courses.

5. To adjust the number of points, click in  the **Adjusted Points** column header. To adjust the number of courses, click  in the **Adjusted Courses** column header. Enter the value, and click .
6. The **Course Breakdown** section shows the breakdown of points the student earned for each course on his or her transcript. This is a good area to check when troubleshooting issues with a student's GPA.

Define Different Credits for Students in the Same Course

Sometimes, on transcript records, you might need to enter a different number of maximum credits earned for students who took the same course.

For example, assume you create an English course to add to the transcripts of students who transfer from another school. Some students might earn 3 credits if the course at their school was a semester course. Other students might earn 5 credits for a trimester course. If you type 3 in the Credit field for one student's transcript, you do not want the system to calculate a lower rank and GPA than it does for students who earned 5 credits for the same course.

To have the system calculate credits correctly if you enter different maximum credits possible for the same course:

1. Enable the **Potential credit override** field in the Data Dictionary.
2. Add the field to the student transcript template(student.std.list.tm.detail).

Note: If your district uses a custom GPA procedure, your Aspen system administrator needs to edit the Java source of the procedure to accommodate the potential credit override.

Managing Graduation Requirements

Track your students' progress in completing graduation requirements at your school. Your school can [create several programs of study](#), which consist of several [requirements](#) that students must meet to complete the program.

Then, you can [track the progress of each student on the Student tab, Transcript side-tab](#). By default, the system tracks the progress of each student for each program of study defined by your district.

You can also [print a report of students who have met or need to meet the requirements in their programs of study](#).

Creating and Managing a Program of Studies

Create and manage programs of studies. These programs contain all courses required for students to complete them.

To create a program of study:

1. [Define the shell of the program](#), including the program name, total number of credits, diploma type, and description.
2. [Define its requirements](#). The requirements are the actual categories of content that students must complete to finish the program of studies. For example, an academic program of studies probably contains a Foreign Language requirement.
3. [Associate the courses](#) available for a student to take to count towards completing a requirement. For example, students might be able to take 20 credits of French, 20 credits of Spanish, or 20 credits of Italian to complete the Foreign Language requirement.

After you create a program of study, define all of its requirements, and associate courses with each requirement, you can [view student progress in completing it](#).

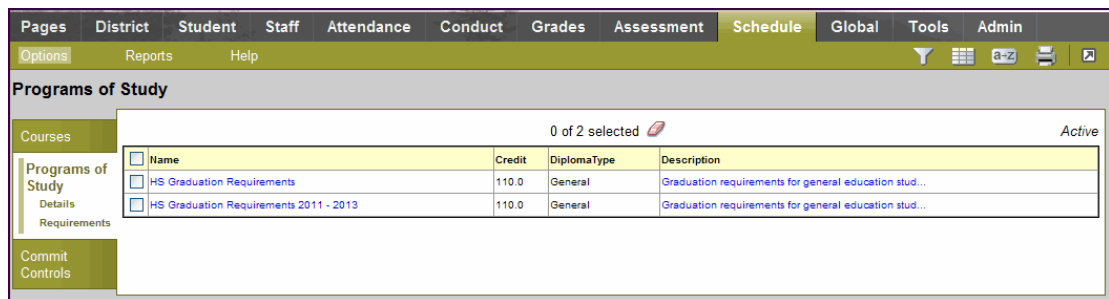
Define Details for a Program of Studies

A program of studies is the shell that contains all of the requirements students assigned to that program must complete.

When creating a program of studies, you first define the details.

To define the details:

1. Log on to the District view.
2. Click the **Schedule** tab, then click the **Programs of Study** side-tab. A list of any previously created programs appears. You can click an existing program to view its details:



<input type="checkbox"/>	Name	Credit	DiplomaType	Description
<input type="checkbox"/>	HS Graduation Requirements	110.0	General	Graduation requirements for general education stud...
<input type="checkbox"/>	HS Graduation Requirements 2011 - 2013	110.0	General	Graduation requirements for general education stud...

3. On the **Options** menu, click **Add**. The Program Studies page appears:

The screenshot shows a web-based form titled "Programs of Study :: HS Graduation Requirements". The form has a sidebar on the left with "Programs of Study" selected. The main form area contains the following fields:

- Name ***: HS Graduation Requirements
- Total credit ***: 110.0
- Diploma type**: General (dropdown menu)
- Description**: Graduation requirements for general education students.
- Obsolete**:
- Hide**:

4. Type a name for the program.
5. At the **Total credit** field, type the total number of credits needed to complete this program.
6. At the **Diploma type** field, select the type of diploma a student receives upon completion of this program.
7. Type a **Description**.
8. Select the **Obsolete** checkbox if the program no longer applies to students.
9. Select the **Hide** checkbox if you want to hide any obsolete programs on the list of programs.

At the bottom of the page, any requirements already defined for the program appear:

Requirements
[Expand All](#) | [Collapse All](#)

Code	Type	Required unit	Description
Art	Credit	2.5	Art including fine arts and performing arts
English	Credit	20.0	4 years of English
English	Other	1.0	Pass MCAS ELA exam (minimum grade: 210)
Foreign Language	Credit	5.0	1 year of a foreign language - French, Spanish, or...
Health Education	Credit	2.5	1 semester of health education
Math	Credit	15.0	3 years of mathematics
Math	Other	1.0	Pass MCAS Math exam (minimum grade: 210)
Music	Credit	2.5	Music including theoretical (classroom) and practi...
Occupational Education	Credit	2.5	1 semester of occupational education
Physical Education	Credit	7.5	3 semesters of physical education; waivers may be ...
Science	Credit	15.0	3 years of science
Social Studies	Credit	15.0	3 years of social studies including humanities and...

Save Cancel

Any requirement with a type of **Requirement Group** or **Program Studies** can be expanded to view the individual rules for that requirement.

10. [Define the requirements for this program.](#)

Define and Manage Program Requirements

Define the requirements within a program of study.

To define requirements:

1. Log on to the District view.
2. Click the **Schedule** tab, then click the **Programs of Study** side-tab.
3. Select the program of study you want to define requirements for, and click **Requirements** on the **Programs of Study** side-tab.
4. On the **Options** menu, click **Add**. The New Graduation Requirement page appears:

The screenshot shows the 'New Graduation Requirement' page. The 'Type' field is set to 'Requirement Group' and the 'Code' field is set to 'Social Studies'. The 'Required unit' field is empty, and the 'Description' field contains the text '3 years of social studies including humanities and history'. Below the form is a 'Requirement List' table with columns for Code, Required unit, Type, and Description. The table contains two rows: one for 'English' with '1.0' units and 'Other' type, and another for 'English' with '20.0' units and 'Credit' type. The 'Relation' dropdown is set to 'And'. Buttons for 'Save', 'Cancel', 'Add', and 'Delete' are visible.

Code	Required unit	Type	Description
<input type="checkbox"/> English	1.0	Other	Pass MCAS ELA exam (minimum grade: 210)
<input type="checkbox"/> English	20.0	Credit	4 years of English

5. At the **Type** field, select one of the following to determine the type of requirement:



Note: The type of requirement you select at the **Type** field determines the fields that appear on the page. For all types, except **Other**, select the **Exclude from total** checkbox if you do not want the credits earned in the requirement to count towards the credit total. **Other**-type requirements automatically do not count towards credit totals.

- **Requirement Group.** The **Requirement List** box appears at the bottom of the page.

Note: For **Requirement Group**-type requirements, you do not have to type a number in the **Required unit** field.

Click **Add** to add the requirements that must be met to complete this requirement. For example, if you are defining the High School Elective requirement, you might add the *Fine Arts*, *Computer Science*, *Physical Education*, and *Music* requirements. After you add one requirement, select **And** or **Or** to determine the relationship between the requirements. Select

And if a student has to meet all of the requirements, or **Or** if they can meet any of the requirements.

- **Credit.** Then, type the number of credits a student must earn in the courses for this requirement.
 - **Programs of Study.** The **Sub programs of study** lookup appears. Here, click  to select another program of study that must be completed to complete this program of study. For example, you might indicate that students must complete the Technology program of study to complete the Academic program of study.
 - **Other.** Click **Define** to define the Evaluation Definition. Like a query, select the table, fields, and operators to define the requirement. For example, your district might determine that students must score greater than 70 on a student assessment. At the **Evaluation** field, click  to select the field that stores the value the student must have to fulfill the requirement. Selecting the field displays the actual value the student has in that field on the Graduation Summary page.
6. Click **Save**. Now, you can [attach courses to the requirement](#).


Attach Courses to Requirements

After you create a program of study and define a requirement for that program, attach the courses to the requirement.


To attach courses to a requirement:

1. Log on to the District view.
2. Click the **Schedule** tab, then click the **Program Studies** side-tab. The list of programs appears.
3. Select the program, and click **Requirements** on the **Program Studies** side-tab. The list of requirements appears.
4. Select the requirement, and click **Courses** on the **Program Studies** side-tab.
5. On the **Options** menu, click **Add**. The Graduation Requirement Course pick list appears:

Course Number	<input type="text"/>	<input type="button" value="OK"/>
School Year	2006-2007	<input type="button" value="v"/>
School Level	All	<input type="button" value="v"/>
Department	All	<input type="button" value="v"/>

<	2: 0071 LANGUAGE ARTS 7	>	0 of 1118 selected 
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<input type="checkbox"/>	Year ID	CrsNo	Description	EquivalentCode
<input type="checkbox"/>	2006-2007	0071	LANGUAGE ARTS 7	
<input type="checkbox"/>	2006-2007	0072	LANGUAGE ARTS 7	
<input type="checkbox"/>	2006-2007	0075	MODIFIED LANGUAGE ARTS 7	
<input type="checkbox"/>	2006-2007	0080	LANGUAGE ARTS 8 (H)	
<input type="checkbox"/>	2006-2007	0081	LANGUAGE ARTS 8	
<input type="checkbox"/>	2006-2007	0082	LANGUAGE ARTS 8	
<input type="checkbox"/>	2006-2007	0083	ALT LANG ARTS	
<input type="checkbox"/>	2006-2007	0085	MODIFIED LANGUAGE ARTS 8	
<input type="checkbox"/>	2006-2007	0121	MATH 6	
<input type="checkbox"/>	2006-2007	0122	MATH 6	

6. If you know the specific number, enter the **Course number**, and click **OK**. Otherwise, you can filter the courses in the list by **School Year**, **School Level**, and **Department**.
7. Select all of the courses that you want to apply to the requirement, and click **OK**.
8. If you want Aspen to award only a specific number of credits earned for the course to apply to the requirement, select **Modify List** on the **Options** menu. Click the  at the top of the **Partial Credit** column. Type the number of credits you want to apply towards this requirement once students complete this course.

For example, assume you are defining a *Humanities* requirement. To fulfill the *Humanities* requirement, students must earn .5 credits from an *English* course, and .5 credits from a *Social Studies* course. The student actually earns 3 credits for each course (6 credits total), but only .5 for each apply to this requirement.

Viewing Programs of Study for a Student

View the programs of study for a student. Use these programs and students' completion of these programs to determine their readiness for graduation. By default, all programs of study created in the District view apply to all students.

You can also determine requirement waivers — reasons a student might not have to complete a requirement within a program of study.

To view programs of study for a student:

1. Log on to the District or School view.

Note: Students can view their programs of study in the Student portal.

2. Click the **Student** tab.
3. Find and select the student.
4. Click the **Transcript** side-tab, then click **Programs of Study**. Any programs already assigned to the student appear.
5. To view the details, click the name:

The screenshot shows the 'Student List' interface for Tyler Adams. The 'Programs of Study' section is active, displaying a search bar and a list of programs. The 'Requirement Waivers' table is also visible.

Code	Required unit	Type	Description	Credits waived	Reasons for the waiver
<input type="checkbox"/> Health Education	2.5	Credit	1 semester of health education	<input type="text" value="2.50"/>	Religious

The total number of credits the student needs to earn, the type of diploma the student earns, and the description appear.

6. Select the **Primary program study** checkbox if more than one program is assigned to the student, and you want to determine which is primary.
7. In the **Requirement Waivers** box, you can define any exceptions to the requirements in the program. Click **Add** to add a waiver.
8. Click **Save**. Then, [view the student's progress in fulfilling the requirements associated with their programs of study](#).

View Graduation Requirement Status for a Student

You can view a student's status in completing a program of study.

To view a student's status:

1. Log on to the District, School, or Build view.

Note: Students can view their graduation summary in the Student portal.

2. Click the **Student** tab.
3. Find and select the student.
4. Click the **Transcript** side-tab, then click **Graduation Summary**.
5. At the **Programs of Study** field, select the program you want to view the status for:

Code	Description	Required unit	Credits waived	Unit completed	Excluded	Completed	Status
Business	1 year Business earning 5 credits	1.0	0.0	0.0			0 % completed
English	4 years of English earning 4 credits	4.0	0.0	0.0			15 % completed
English	MCAS ELA passing score	0.0		41.00			✓
English	English electives	1.0	0.0	0.0			0 % completed
Fine Arts	1 year of any IA/PA earning 1 credit	1.0	0.0	0.0			0 % completed
Fine Arts		2.0	0.0	0.4			20 % completed
Fine Arts		2.0	0.0	0.0			0 % completed
Physical Education	4 years of Physical Education earning 3 credits	3.0	2.0	2.0	✓		67 % completed
Science	3 years of Science earning 4 credits	4.0	0.5	0.5			13 % completed
Social Studies	3 years of Social Studies earning 3 credits	3.0	1.5	1.5			50 % completed
Testing - Assessments	MCAS Math Grade 10 (Level: Advanced or Proficient)	1.0					0 % completed
Testing - Assessments	MCAS ELA Grade 10 (Level: Advanced or Proficient)	1.0					✓
Total		23.0	0.0	4.0			20% completed

Requirement	School Year	Grade level	Number	Description	Equivalent content code	Included	Credits Gained (Credits Total)
Business							
1 year Business earning 5 credits				No matching records			
English	2010-2011	12	042	College English 12		✓	0.0(1.0)
4 years of English earning 4 credits							
English				No matching records			

6. At the top of the page, click **Printer Friendly Version** to print the information.

Note: Your system administrator can update the *student.std.list.gradProgress* template to customize the information that appears in the student information box.

The top of the page displays the **Code**, **Description**, **Required unit**, **Credits waived**, **Unit completed**, **Excluded**, and **Completed Status** for every requirement in the program.

Note: If a student completes more than the required credits for a graduation requirement, the **Unit completed** column displays both the total number of credits earned and the extra credits earned.

For example, if a student earns 26 credits for a requirement, of which 15 are required, the **Credits completed** column displays **26 (11)**. This indicates that the student completed 26 credits, of which 11 are extra. The system uses the total number of credits gained for each requirement to calculate the total number of credits gained towards graduation.

If a checkmark appears in the **Excluded** column, Aspen does not include the units completed for that requirement in the total.

The bottom of the page provides the Course Breakdown, which breaks each requirement into the courses attached to it, and the student's status in completing those courses:

Course Breakdown						
Requirement	School Year	Grade level	Number	Description	Equivalent content code	Included/Credits Gained (Credits Total)
Business				No matching records		
1 year Business earning 5 credits						
English	2010-2011	12	042	College English 12		✓ 0.6(1.0)
4 years of English earning 4 credits						
English				No matching records		
MCAS ELA passing score						
English electives				No matching records		
Fine Arts				No matching records		
1 year of any IA/FA earning 1 credit						
Fine Arts	2010-2011	12	042	College English 12		✓ 0.4(1.0)
Physical Education	2008-2009	10	936	Adaptive PE		✓ 1.0
4 years of Physical Education earning 3 credits	2009-2010	11	936	Adaptive PE		✓ 1.0
Science	2008-2009	10	994	Modified Chemistry	Science	✓ 0.5
3 years of Science earning 4 credits	2008-2009	10	997	Intro to Horticulture	Science	✓ 0.5
Social Studies	2010-2011	12	123	Psychology		✓ 1.0
3 years of Social Studies earning 3 credits						
Testing - Assessments				No matching records		
MCAS Math Grade 10 (Level: Advanced or Proficient)						
Testing - Assessments				No matching records		
MCAS ELA Grade 10 (Level: Advanced or Proficient)						
WL - French				No matching records		
WL - Latin				No matching records		
WL - Spanish				No matching records		

The Course Breakdown also displays columns, or fields, of information about each course attached to a program requirement. Some of these fields appear by default, while others can be specified to appear by your system administrator. The following fields are included by default:

- The **Equivalent content code** column displays the content code assigned to that record if the student transferred the credits from that course from a different school.
- The **Included** column indicates if the units earned in the course apply to the credits gained total.
- The **Credits Gained (Credits Total)** column displays the number of credits earned by the student that count towards the requirement total. For example, if 0.4(1.0) displays, the student earned 1.0 units for the course, but only 0.4 credits are counted toward that requirement total, as needed.

Your administrator can also specify any transcript definition column to appear as an additional field in the Course Breakdown section.

Run the Graduation Progress Report

Run the Graduation Progress report to view a list of students and their status in completing graduation requirements:

Aspen Public Schools		Graduation Progress				Crow Point High School	
Page 1		HS Graduation Requirements					
Student Name	ID	YOG	Credits Status				Completed
			Require	Waived	Gained	In	
Adams, Abigail	242852	2011	23.00	0.00	4.0	0.00	20.0%
Adams, Tyler	224740	2012	23.00	0.00	13.25	1.50	45.0%
Agurkis, Adam	293663	2012	23.00	0.00	6.0	4.00	4.0%
Agurkis, Tommy	267394	2011	23.00	0.00	13.0	4.00	61.0%
Ahearn, Jack	213856	2012	23.00	0.00	8.0	5.25	4.0%
Ahearn, Mia	286396	2011	23.00	0.00	10.0	0.00	43.0%
Ahern, Iszabella	226984	2011	23.00	0.00	2.0	3.00	4.0%
Ahern, Rebecca	286369	2013	23.00	0.00	3.0	5.50	0.0%
Alarcon, Jason	243917	2014	23.00	0.00	1.0	5.00	0.0%
Alford, Mary	216695	2014	23.00	0.00	1.0	5.00	0.0%



To run the graduation progress report:

1. Log on to the School view.
2. Click the **Student** tab.
3. On the **Reports** menu, click **Graduation Progress**. The Graduation Progress dialog box appears:

Graduation Progress

<p>School</p> <p>Program of Studies</p> <p>Requirement</p> <p>Students to include</p> <p>Search value</p> <p>Only show students with...</p> <p>...percent complete</p> <p>Sort student by</p> <p>Create snapshots</p> <p>Snapshot name</p> <p>Snapshot owner</p> <p>Create history</p> <p>Format</p>	<p>Crow Point High School</p> <p>HS Graduation Requirements</p> <p><input type="text"/></p> <p>YOG</p> <p>2013</p> <p>Less than</p> <p>80</p> <p>Name</p> <p><input checked="" type="checkbox"/></p> <p>Seniors Need Credits</p> <p>User</p> <p><input checked="" type="checkbox"/></p> <p>Adobe Acrobat (PDF)</p>
---	--

4. Use the following table to enter information in the fields:

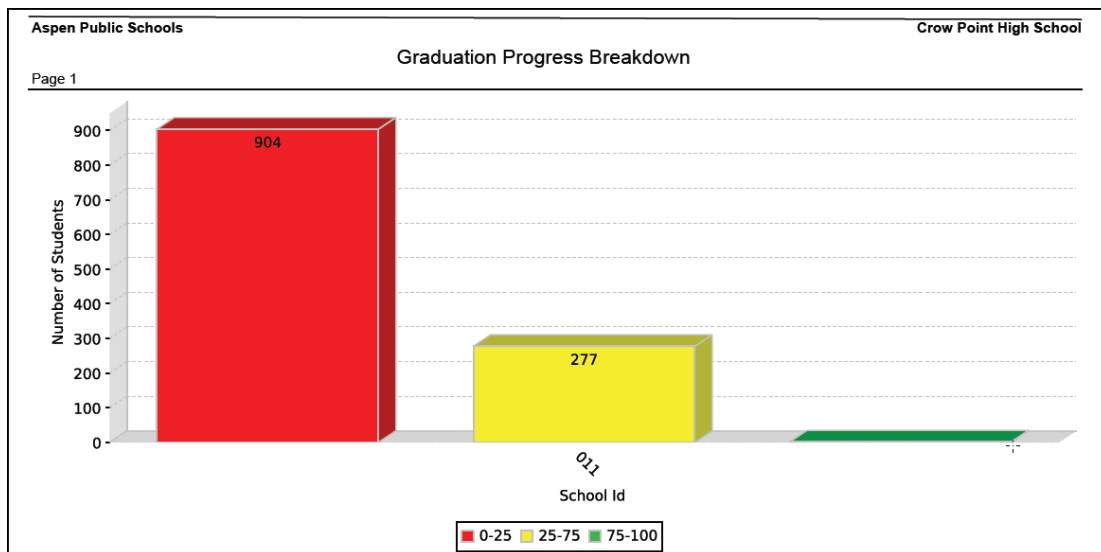
Field	Description
School	The school you are currently working in appears.
Program of Studies	Click  to select the program of studies you want to run the report for.
Requirement	To run the report for a specific requirement within the program of study selected, click  to select the requirement.
Students to include	<p>Select one of the following to determine the students you want to include:</p> <ul style="list-style-type: none"> • All • Current selection • YOG
Search value	If you selected YOG at the Students to include field, type the year of graduation.
Only show students with... AND ...percent complete	<p>Select one of the following operators to determine the students to include on the report:</p> <ul style="list-style-type: none"> • Less than • Equal to • Greater than <p>Then, at the ...percent complete field, type the number that represents the students you want to view on the report.</p> <p>For example, you might want to view students who are more than 75% complete in fulfilling the requirements in the program of study you selected.</p>
Sort student by	<p>Select one of the following to determine how the report sorts the included students:</p> <ul style="list-style-type: none"> • Name • YOG
Create snapshot Snapshot name Snapshot owner	<p>Select the Create snapshots checkbox if you want Aspen to automatically create a snapshot for the group of students that appear on this report.</p> <p>If you select this checkbox, type the name of the snapshot in the Snapshot name field.</p> <p>Then, at the Snapshot owner field, select one of the following to determine the owner of the snapshot:</p>

Field	Description
	<ul style="list-style-type: none"> User School District
Create history	Select this checkbox to store the information Aspen compiles in this instance of the report so that it is readily available when you run the Graduation Progress Chart report .
Format	Select the format you want the report to appear in.

5. The report appears in the format you specify.

Graduation Progress Chart Report

The Graduation Progress Chart report displays a bar graph showing the percentage of students who have met the requirements for a program of study:



The report shows a bar that indicates the number of students who have fulfilled one of the following percentage ranges for the program of study and requirement you selected:

- 0-25 (red)
- 25-75 (yellow)
- 75-100 (green)

The report also contains a table that analyzes the data in the graph.

To run the Graduation Progress Chart report:




1. Log on to the School view.
2. Click the **Student** tab.

- On the **Reports** menu, click **Graduation Progress Chart**. The Graduation Progress Chart dialog box appears:

Graduation Progress Chart

School	Crow Point High School
School year	2011
Program of Studies	HS Graduation Requirements
Requirement	
Students to include	YOG <input type="text"/>
Search value	<input type="text" value="2013"/>
Exclude 9th grade	<input checked="" type="checkbox"/>
Include schools	All <input type="text"/>
Search value	<input type="text"/>
Break school in graph by	School level <input type="text"/>
Recalculate history	<input checked="" type="checkbox"/>
Format	Adobe Acrobat (PDF) <input type="text"/>

- Use the following table to enter information in the fields:

Field	Description
School	The school you are logged onto appears.
School year	Click the  to select the school year you want to run the report for.
Program of Studies	Click the  to select a specific program of study.
Requirement	If you want to run the report for a specific requirement only, click the  to select the requirement.
Students to include	Select one of the following to determine the students that appear on the report: <ul style="list-style-type: none"> • All • Current selection • YOG
Search value	If you selected YOG at the Students to include field, type the year of graduation you want to include on the report.
Exclude 9th grade	Select this checkbox to exclude any students in Grade 9 from the report, because ninth graders often have a low number of requirements fulfilled.
Include schools	Select one of the following: <ul style="list-style-type: none"> • All • School level: Type the level in the Search value field. • School type: Type the type in the Search value field.
Search value	If you select School level or School type , type the specific value.
Break school in graph by	Select if you want to break the graph by one of the following: <ul style="list-style-type: none"> • School level • School type
Recalculate history	Select this checkbox if you want the report to recalculate the values for the graph. Otherwise, Aspen uses the data last compiled for the Graduation Progress report .
Format	Select the format in which you want the report to appear.


5. Click **Run**. The report appears with the information you selected.

Enter or View Student Assessments

Enter or view assessment information, such as the score a student receives on the PSATs.

You can also [enter assessment information for a group of students at one time](#).

To enter or view assessment information for a student:

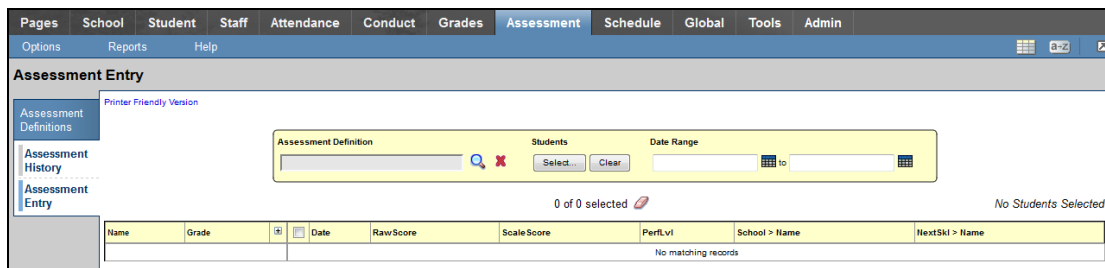
1. Log on to the District view.
2. Click the **Student** tab.
3. [Search for and select the student.](#)
4. Click the **Assessments** side-tab. Existing assessment records are listed.
5. To filter the types of assessments, at the **Assessment Definition** field, click  and select the Assessment Definition you would like to enter or view. To view all types of assessments, leave this field blank.
6. Do one of the following:
 - To view a student’s scores for an existing assessment record, select the record, and click **Details** on the **Assessments** side-tab.
 - To enter a new assessment record, on the **Options** menu, click **Add**. The New Student Assessment page appears. Enter the information, and click **Save**.


Enter Assessment Information for Groups of Students

You can enter assessment information for groups of students at a time. You can also [enter assessment information one student at a time](#), if needed.

To enter assessment information:

1. Log on to the Intermediate Organization or School view.
2. Click **Assessment**, then **Student Assessments**.
3. Click **Assessment Entry**. The Assessment Entry page appears:



4. At **Assessment Definition**, click  and the Assessment Definition Pick List appears. Select the assessment definition you want to enter information for.
5. Click **OK**.
6. At **Students**, click **Select**. The Assessment Entry Multi-Add pop-up appears. If your root organization has specified that you can enter assessment information for secondary students in its Membership preferences, select **Include Secondary Students** to enter their information.
7. Specify the group of students you want to enter information for. If you select:
 - **Course**, the Course pick list appears.
 - **Section**, the Section pick list appears.
 - **Homerroom**, the Homerroom pick list appears.

- **Grade level**, the Grade Level pick list appears.
- **Group**, the Group pick list appears.
- **Query**, the Query pick list appears.
- **Snapshot**, the Snapshot pick list appears.
- **Selection**, the Student pick list appears.


Note: **Course**, **Section**, and **Homerroom** are only available in the School view.

When you click the selection, the number of students in that group appears at **Selected students** at the bottom of the pop-up.

8. Click **OK**.

The **Assessment Entry** page appears, listing the students in the selected group. For each student, any existing assessment records for this assessment definition appear. Otherwise a blank assessment record appears for data entry.

Note: To limit the display of existing assessment records, enter dates in the **Date Range** fields. Aspen will only display existing assessment records within the date range you specify.

9. You can manage your field set to customize the columns that appear on the list. It is recommended that you include a **Date** column and enter the date of the assessment record. Today's date is the default value.
10. Enter the assessment information for each student. Aspen automatically saves the assessment record once you enter it. If a student already has an assessment record, click  in the student's row to enter another one.

Note: To quickly move 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 **Fill-Down Values** on the **Options** menu. Aspen enters the same value in that column for every student. Then, you can change the value for the few students whose values are different.

To delete an assessment record, select the checkbox in that row, then click **Delete** on the **Options** menu. To change a field's value back to its previous value, click it and select **Revert Current Cell** on the **Options** menu.

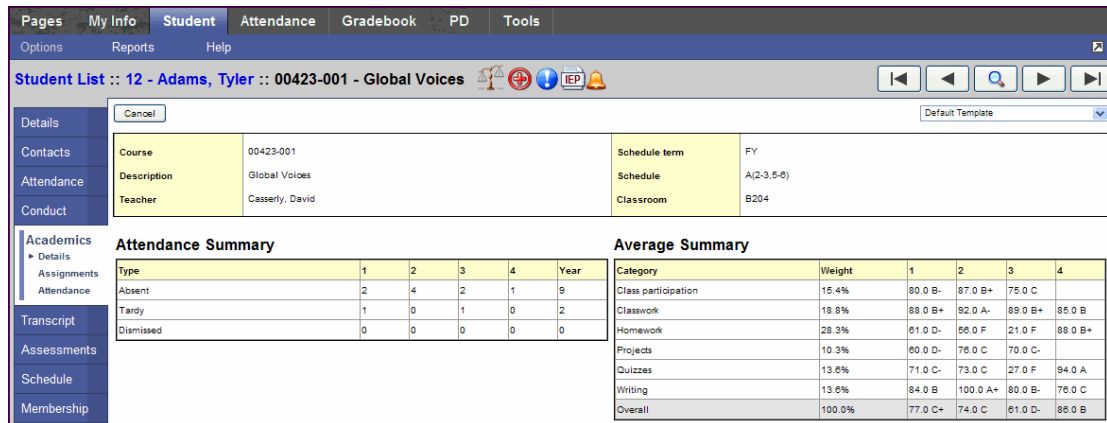
At the top of the page, click **Printer Friendly Version** to print the assessment information.

View the Details of Your Students' Other Classes

Users in the School view, Special Education view, and teachers in the Staff view can view the details for a students' other classes, such as their attendance summary and average summary.

To view the details of your students' other classes:

1. Do one of the following:
 - Log on to the Staff view.
 - Log on to the School view.
 - Log on to the Special Education view.
2. Click the **Student** tab.
3. Select a student, and click the **Academics** side-tab. A list of the student’s current classes appears.
4. Select a class, and click **Details** on the **Academics** side-tab:



The top of the page lists the details of the course section, including schedule and room.

The **Attendance Summary** lists the student’s attendance records by term.

The **Average Summary** lists the student’s grades by assignment categories.

Working With and Viewing a Student's Schedule

You can [view a student’s schedule](#) in the District, School, and Build views. In the Build and School views, you can also do the following:

- Enter a student’s scheduling parameters.
- Email all of the teachers on a student’s schedule.
- Make changes to a student’s schedule.
- View a student's change history.
- View the student’s schedule matrix.
- Manage student requests for next year.

View a Student's Schedule

You can view a student’s schedule. This way, you can quickly see where a student is at any time of the day.

To view a student's schedule:

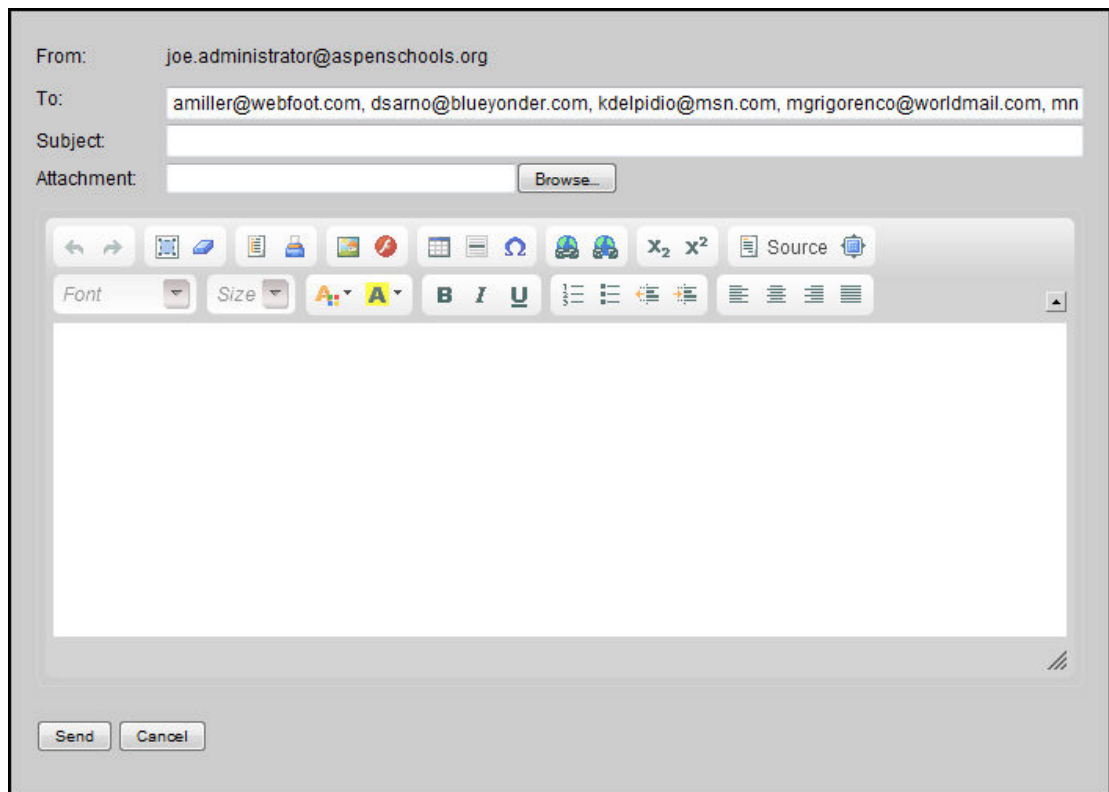
1. Log on to the District, or Staff view.
2. Click the **Student** tab.
3. [Search for and select the student.](#)
4. Click the **Schedule** side-tab. The student's current schedule appears.
5. To view the details for a course, select the course, and click **Details** on the **Schedule** side-tab.

Email a Student's Teachers

You can send an email to all of a student's current teachers.

To send an email to a student's teachers:

1. Log on to any view except the Build view.
2. Click the **Student** tab.
3. Select a student, and click the **Schedule** side-tab. The student's schedule appears.
4. On the **Options** menu, click **Send Email**. The Mass Email pop-up appears:



5. In the **To** field, email addresses for this student's teachers appear. You can add to or remove email addresses.
6. Type the **Subject** and email text.
7. Click **Send**.

View a Student Schedule Matrix

Use the Student Schedule Matrix to view where a student is during the current period and day.

To view a student's schedule matrix:

1. Log on to the School, Build, or Staff view.
2. Click the **Student** tab.
3. [Search for and select the student.](#)
4. Click the **Schedule** side-tab, then click **Matrix view**.

Student List :: 12 - Adams, Tyler

Matrix view >>

0 of 10 selected

Course	Description	Schedule	Term	Classrm	Teacher
08812-002	Class Guitar	A(1,4)	FY	D105	Davis, Alec
00423-001	Global Voices	A(2-3,5-6)	FY	B204	Casserly, David
05003-001	Intro. to Business	B(1-2,4-5)	FY	C107	Mogonagle, Katherine
07911-003	Learning Center	B(3,6)	FY	E201	Chambers Maher, Hannah
03103-005	Physics	C(1,3-4,6)	FY	H102	Alicea, Jake; Brandy, Haylee
02313-002	Personal Finance	C(2,5) D(1,4)	FY	C107	Mogonagle, Katherine
01534-001	Psychology	D(2-3,5-6)	FY	A209	Petitti, Klaus
00101-011	Directed Study	E(1,4)	FY	D109A	Pisera, Jurgen
00012-002	Community Service	E(2,5)	FY	HR1	Shi, Yubin
09251-002	Cross Training	E(3,6)	FY	GYM A	Morgan, David

5. The student's schedule for the current term appears in matrix format:

Managing Student Information

Pages	School	Student	Staff	Attendance	Conduct	Grades	Assessment	Schedule	Global	Admin	
Options Reports Help											
Student List :: 12 - Adams, Tyler											
<< List view											
Details											
Contacts	Time S1										
Attendance											
Conduct											
Transcript											
Assessments											
Schedule											
Workspace											
Attributes											
Change History											
Conflicts											
Requests											
Graduation Progress											
Membership											
Transactions											
Documents											
Snapshots											
		1 - 1	2 - 2	3 - 3	4 - 4	5 - 5	6 - 6				
A-A Block		08612-002 Class Guitar Davis, Alec D105	00423-001 Global Voices Casserty, David B204	00423-001 Global Voices Casserty, David B204	08612-002 Class Guitar Davis, Alec D105	00423-001 Global Voices Casserty, David B204	00423-001 Global Voices Casserty, David B204				
B-B Block		05003-001 Intro. to Business Mogonagle, Katherine C107	05003-001 Intro. to Business Mogonagle, Katherine C107	07911-003 Learning Center Chambers Maher, Hannah E201	05003-001 Intro. to Business Mogonagle, Katherine C107	05003-001 Intro. to Business Mogonagle, Katherine C107	07911-003 Learning Center Chambers Maher, Hannah E201				
C-C Block		03103-005 Physics Alicoa, J. Brandy, H H102	02313-002 Personal Finance Mogonagle, Katherine C107	03103-005 Physics Alicoa, J. Brandy, H H102	03103-005 Physics Alicoa, J. Brandy, H H102	02313-002 Personal Finance Mogonagle, Katherine C107	03103-005 Physics Alicoa, J. Brandy, H H102				
D-D Block		02313-002 Personal Finance Mogonagle, Katherine C107	01534-001 Psychology Petitti, Klaus A209	01534-001 Psychology Petitti, Klaus A209	02313-002 Personal Finance Mogonagle, Katherine C107	01534-001 Psychology Petitti, Klaus A209	01534-001 Psychology Petitti, Klaus A209				
E-E Block		00101-011 Directed Study Pisera, Jurgen D109A	00012-002 Community Service Shi, Yubin HR1	09251-002 Cross Training Morgan, David GYM A	00101-011 Directed Study Pisera, Jurgen D109A	00012-002 Community Service Shi, Yubin HR1	09251-002 Cross Training Morgan, David GYM A				

Note: To view the schedule in a list format, click **List view** at the top left of the page.


The matrix color-codes the sections so that they are easy to see on a rotating schedule, and highlights where the student currently is.

- At the top of the page, if the student is a secondary student, the **School** field appears. Select the school you want to view the schedule for.
- Also at the top of the page, the **Time** field appears. Select the term you want to view the schedule for, or select **Today**. If you select the full year, the system separates courses that take place during the same period but during different terms with a dashed line.

Note: If you select **Today** and your school builds a schedule with bell schedules, the times of the bells appear in the **Periods** column. Also, if your school associates bell schedules with specific dates in your school calendars, the system highlights the student's current section based on the bell schedule. For example, if it is an early release day, the system highlights where the student is at the current time based on the early release bell schedule, as indicated on the school calendar.

Define Student Scheduling Parameters

Before you build your schedule, you need to define scheduling parameters, such as which students to schedule, and scheduling priorities for your students.

Note: If a scenario does not use shared schedule attributes,  appears next to each of the schedule attributes to indicate they are privately owned by the current scenario.

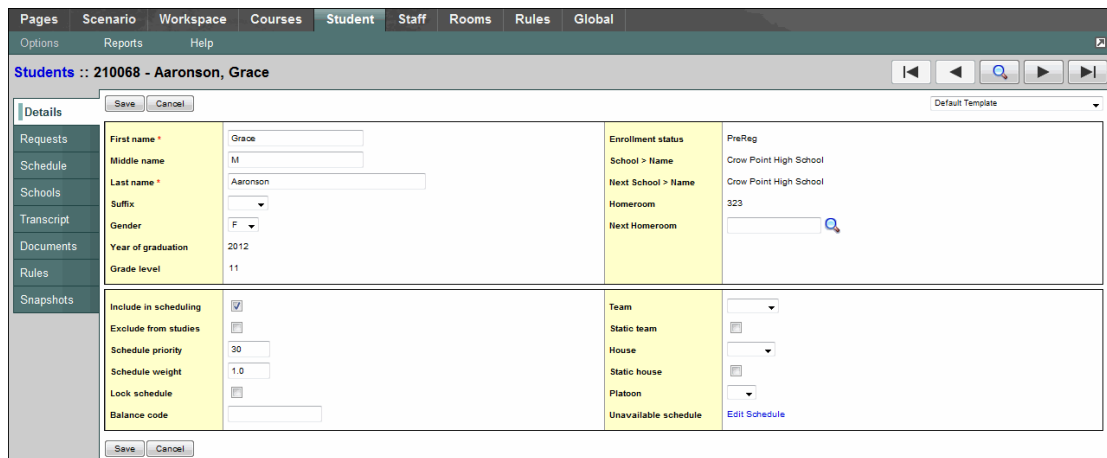
To copy student scheduling parameters from the previous year's schedule, on the **Options** menu, click **Refresh**. Or, click **Mass Update** on the **Options** menu to define most of these scheduling parameters.

To define student scheduling parameters:

1. Do one of the following:
 - Log on to the Build view. Click the **Student** tab. Then, select the student you want to define preferences for.
 - Log on to the School view. Click the **Student** tab. Select the student you want to define preferences for, and click the **Schedule** side-tab, then click **Attributes**.

The student scheduling parameters appear:

Note: The information on the top half of the page is the live, current data. Do not change any information here. The bottom half of the page contains the attributes you enter/edit.



The screenshot shows a software interface for managing student information. The top navigation bar includes 'Pages', 'Scenario', 'Workspace', 'Courses', 'Student', 'Staff', 'Rooms', 'Rules', and 'Global'. Below this, there are sub-menus for 'Options', 'Reports', and 'Help'. The main title is 'Students :: 210068 - Aaronson, Grace'. A sidebar on the left contains tabs for 'Details', 'Requests', 'Schedule', 'Schools', 'Transcript', 'Documents', 'Rules', and 'Snapshots'. The 'Details' tab is active, showing a form with the following fields:

First name *	Grace	Enrollment status	PreReg
Middle name	M	School > Name	Crow Point High School
Last name *	Aaronson	Next School > Name	Crow Point High School
Suffix		Homeroom	323
Gender	F	Next Homeroom	
Year of graduation	2012		
Grade level	11		
Include in scheduling	<input checked="" type="checkbox"/>	Team	
Exclude from studies	<input type="checkbox"/>	Static team	<input type="checkbox"/>
Schedule priority	90	House	
Schedule weight	1.0	Static house	<input type="checkbox"/>
Lock schedule	<input type="checkbox"/>	Platoon	
Balance code		Unavailable schedule	Edit Schedule

2. Use the following table to enter information in the fields:

Field	Description
<p>Include in scheduling</p>	<p>Select this checkbox to include the student when you build the schedule.</p> <p>Note: By default, the system includes every student. Therefore, you need to deselect the students you do not want to schedule.</p>
<p>Exclude from studies</p>	<p>Select this checkbox if you do not want to schedule the student in study halls. For example, this student might go to the vocational program in another school during afternoon periods.</p>
<p>Schedule priority</p>	<p>Type a number to indicate the student's scheduling priority.</p> <p>For example, you might search for and select all students who will be seniors next year. Then, you mass update this field to contain the value of 10. You do the same for juniors (20), sophomores (30), and freshmen (40). This way, the system schedules seniors, then juniors, then sophomores, then freshmen.</p> <p>Note: You can create subgroups within groups, such as 5 for AP seniors, and 35 for freshmen. The lower the number, the higher the priority.</p>
<p>Schedule weight</p>	<p>Type a number to determine how many seats this student requires in a section.</p> <p>By default, students have a schedule weight of 1. You might define a weight of 1.5, or 2 to determine specific students fill more than one seat due to his or her IEP requirements.</p>
<p>Lock schedule</p>	<p>Select this checkbox if you want the schedule the system builds for this student to stay the same each time you run a load.</p> <p>Note: Use this checkbox if you have manually made changes to the student's schedule, or the schedule for this student is perfect, and you will be reloading.</p>
<p>Balance code</p>	<p>When building the master schedule, the system automatically balances sections by the number of students. If you want to balance section counts by ethnic code, gender, or grade, select that option on the course scheduling parameters page. To balance section counts using a different balance value, enter the value here.</p> <p>For example, assume the ninth graders in your high school are coming from several schools in your district. You might enter the students' previous middle school as the balance code to ensure that sections do</p>

	<p>not fill with students coming from the same middle school.</p> <p>If you enter balance codes for students, when you define course scheduling parameters, select Other at the Section balance type field. Then, when you build and load the schedule, the system spreads students with the same balance code across all sections.</p>
Team	Select a team if you want to assign this student to a team.
Static Team	If you select a team for this student, the system selects this checkbox automatically when you save the record..
House	Select a house if you want to assign this student to a house.
Static House	If you select a house for this student, the system selects this checkbox automatically when you save the record.
Platoon	Select a platoon if you want to assign this student to a platoon.
Unavailable schedule	<p>If the student cannot attend classes during specific periods, click Edit Schedule to determine the terms, days, and periods the system cannot schedule that student. A schedule matrix appears.</p> <p>Select the term, then click in the days and periods the student is unavailable. Click OK.</p>

Note: If you do not select a team, house, or platoon for the student but you build a schedule that uses them, the system makes a random assignment if a student requests a course section assigned to a team, house, or platoon.

3. Click **Save**.



Making Changes to a Student's Current Schedule

During the school year, you might need to [add course sections](#) to and [drop course sections](#) from a student's schedule. To make these changes, click the **Student** tab. On the **Schedule** side-tab, click **Workspace**.

There are two ways to make changes to a student schedule:

1. Use the list view:

Managing Student Information

Pages	School	Student	Staff	Attendance	Conduct	Grades	Assessment	Schedule	Global	Admin
Options Reports Help										
Student List :: 11 - Aaronson, Grace  										
Student Schedule (100% scheduled - Class credits: 7.0) 0 of 7 selected										
Course	Description	Term	Schedule	Unrotated Schedule	Teacher	Clssrm	SecType	Team	House	Plato
032-03	College English 11	FY	1(A-F)		Brabants, Nicole	216				
031-03	American Literature C	FY	2(A-F)		Stevens, Jenna	212				
110-02	American Studies 2 H	FY	3(A-F)		Gold, Ann	202				
050-02	Humanities H	FY	4(A-F)		O'Brien, Rene	224				
231-03	Algebra 3/Trig C	FY	5(A-F)		Cabral, Elizabeth	309				
031-01	American Literature C	FY	6(A-F)		Phillips, Thomas	215				
414-01	French 4	FY	7(A-F)		Khang, Brandon	103				

2. Use the matrix view:

Details	Course Requests	Student Schedule (100% scheduled - Class credits: 7.0)																																																							
<p>Course Requests</p> <p>Course: <input type="text"/> Allow over max: <input type="checkbox"/></p> <p>Primary</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> 031 American Literature C <input checked="" type="checkbox"/> 032 College English 11 <input checked="" type="checkbox"/> 110 American Studies 2 H <input checked="" type="checkbox"/> 231 Algebra 3/Trig C <input checked="" type="checkbox"/> 356 Forensic Science <input checked="" type="checkbox"/> 357 Intro to Human Anatomy & Physiology <p>Alternate</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> 028 SAT Prep Eng <input checked="" type="checkbox"/> 031 American Literature C <input checked="" type="checkbox"/> 414 French 4 <input checked="" type="checkbox"/> 451 Latin 1 <p>Number: <input type="text"/> Add: <input type="button" value="Add"/></p> <p>Select: <input type="button" value="Select"/> Drop All: <input type="button" value="Drop All"/> Update: <input type="button" value="Update"/></p>	<p>Term code: FY Work mode: Manual Allow conflicts: <input type="checkbox"/> Allow all over max: <input type="checkbox"/></p> <table border="1"> <thead> <tr> <th></th> <th>A</th> <th>B</th> <th>C</th> <th>D</th> <th>E</th> <th>F</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>032-03 College English 11 Brabants, N 216</td> <td>032-03 College English 11 Brabants, N 212</td> <td>032-03 College English 11 Brabants, N 216</td> <td>032-03 College English 11 Brabants, N 216</td> <td>032-03 College English 11 Brabants, N 212</td> <td>032-03 College English 11 Brabants, N 216</td> </tr> <tr> <td>2</td> <td>031-03 American Literature C Stevens, J 212</td> <td>031-03 American Literature C Stevens, J 212</td> <td>031-03 American Literature C Stevens, J 212</td> <td>031-03 American Literature C Stevens, J 212</td> <td>031-03 American Literature C Stevens, J 212</td> <td>031-03 American Literature C Stevens, J 212</td> </tr> <tr> <td>3</td> <td>110-02 American Studies 2 H Gold, A 202</td> <td>110-02 American Studies 2 H Gold, A 202</td> <td>110-02 American Studies 2 H Gold, A 202</td> <td>110-02 American Studies 2 H Gold, A 202</td> <td>110-02 American Studies 2 H Gold, A 202</td> <td>110-02 American Studies 2 H Gold, A 202</td> </tr> <tr> <td>4</td> <td>050-02 Humanities H O'Brien, R 224</td> <td>050-02 Humanities H O'Brien, R 224</td> <td>050-02 Humanities H O'Brien, R 224</td> <td>050-02 Humanities H O'Brien, R 224</td> <td>050-02 Humanities H O'Brien, R 224</td> <td>050-02 Humanities H O'Brien, R 224</td> </tr> <tr> <td>5</td> <td>231-03 Algebra 3/Trig C Cabral, E 309</td> <td>231-03 Algebra 3/Trig C Cabral, E 309</td> <td>231-03 Algebra 3/Trig C Cabral, E 309</td> <td>231-03 Algebra 3/Trig C Cabral, E 309</td> <td>231-03 Algebra 3/Trig C Cabral, E 309</td> <td>231-03 Algebra 3/Trig C Cabral, E 309</td> </tr> <tr> <td>6</td> <td>031-01 American Literature C Phillips, T 215</td> <td>031-01 American Literature C Phillips, T 215</td> <td>031-01 American 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English 11 Brabants, N 216	032-03 College English 11 Brabants, N 216	032-03 College English 11 Brabants, N 212	032-03 College English 11 Brabants, N 216	2	031-03 American Literature C Stevens, J 212	031-03 American Literature C Stevens, J 212	031-03 American Literature C Stevens, J 212	031-03 American Literature C Stevens, J 212	031-03 American Literature C Stevens, J 212	031-03 American Literature C Stevens, J 212	3	110-02 American Studies 2 H Gold, A 202	110-02 American Studies 2 H Gold, A 202	110-02 American Studies 2 H Gold, A 202	110-02 American Studies 2 H Gold, A 202	110-02 American Studies 2 H Gold, A 202	110-02 American Studies 2 H Gold, A 202	4	050-02 Humanities H O'Brien, R 224	050-02 Humanities H O'Brien, R 224	050-02 Humanities H O'Brien, R 224	050-02 Humanities H O'Brien, R 224	050-02 Humanities H O'Brien, R 224	050-02 Humanities H O'Brien, R 224	5	231-03 Algebra 3/Trig C Cabral, E 309	231-03 Algebra 3/Trig C Cabral, E 309	231-03 Algebra 3/Trig C Cabral, E 309	231-03 Algebra 3/Trig C Cabral, E 309	231-03 Algebra 3/Trig C Cabral, E 309	231-03 Algebra 3/Trig C Cabral, E 309	6	031-01 American Literature C Phillips, T 215	031-01 American Literature C Phillips, T 215	031-01 American Literature C Phillips, T 215	031-01 American Literature C Phillips, T 215	031-01 American Literature C Phillips, T 215	031-01 American Literature C Phillips, T 215	7	414-01 French 4 Khang, B 103	414-01 French 4 Khang, B 103	414-01 French 4 Khang, B 103	414-01 French 4 Khang, B 103	414-01 French 4 Khang, B 103	414-01 French 4 Khang, B 103
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4	050-02 Humanities H O'Brien, R 224	050-02 Humanities H O'Brien, R 224	050-02 Humanities H O'Brien, R 224	050-02 Humanities H O'Brien, R 224	050-02 Humanities H O'Brien, R 224	050-02 Humanities H O'Brien, R 224																																																			
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3. In either view, click **Post** to post changes to the student's schedule.

Note: If you switch the student from one section to another section of the same course and the student has a transcript record for the previous section, the 'Update transcripts to new section' dialog box appears. To move any grades from the original section to the new section on the student's transcript, select the **Update** checkbox:

Update transcripts to new section

Current transcript record	New transcript record	Update
00204-002 English II	00203-003 English II	<input checked="" type="checkbox"/>

When you add course sections to a student’s schedule, you can enter a specific course and section number, or the system can help you find a course section that is available during a certain period, or in a specific department.

Also, the system can [reschedule a student](#). When you click **Reschedule**, the system deletes the student’s schedule and attempts to schedule him or her in as many requested courses as possible.

You can also [update course requests](#).

Make Student Schedule Changes Using the Matrix

Make changes to a student’s schedule using the Workspace matrix. The Matrix view provides a more visual tool for making schedule changes because you can drag and drop course requests to any available matrix cells.

To make student schedule changes using the Workspace matrix:

1. Log on to the School view.
2. Click the **Student** tab.
3. Click the **Schedule** side-tab.
4. On the **Schedule** side-tab, click **Workspace**. Either the List view or Matrix view appears. If you are not on the Matrix view, click **Matrix view** in the upper-right corner of the page. The Matrix view appears:

Details

Course Requests

Course Allow over max

Primary

- 031 American Literature C
- 032 College English 11
- 110 American Studies 2 H
- 231 Algebra 3/Trig C
- 356 Forensic Science
- 357 Intro to Human Anatomy & Physiology

Alternate

- 026 SAT Prep Eng
- 031 American Literature C
- 414 French 4
- 451 Latin 1

Workspace

Number

Show courses excluded from scheduling

Student Schedule (100% scheduled - Class credits: 7.0) << List view


Term code FY Work mode Manual Allow conflicts Allow all over max

	A	B	C	D	E	F
1	032-03 College English 11 Brabants, N 216	032-03 College English 11 Brabants, N 216	032-03 College English 11 Brabants, N 216	032-03 College English 11 Brabants, N 216	032-03 College English 11 Brabants, N 216	032-03 College English 11 Brabants, N 216
2	031-03 American Literature C Stevens, J 212	031-03 American Literature C Stevens, J 212	031-03 American Literature C Stevens, J 212	031-03 American Literature C Stevens, J 212	031-03 American Literature C Stevens, J 212	031-03 American Literature C Stevens, J 212
3	110-02 American Studies 2 H Gold, A 202	110-02 American Studies 2 H Gold, A 202	110-02 American Studies 2 H Gold, A 202	110-02 American Studies 2 H Gold, A 202	110-02 American Studies 2 H Gold, A 202	110-02 American Studies 2 H Gold, A 202
4	050-02 Humanities H O'Brien, R 224	050-02 Humanities H O'Brien, R 224	050-02 Humanities H O'Brien, R 224	050-02 Humanities H O'Brien, R 224	050-02 Humanities H O'Brien, R 224	050-02 Humanities H O'Brien, R 224
5	231-03 Algebra 3/Trig C Cabral, E 309	231-03 Algebra 3/Trig C Cabral, E 309	231-03 Algebra 3/Trig C Cabral, E 309	231-03 Algebra 3/Trig C Cabral, E 309	231-03 Algebra 3/Trig C Cabral, E 309	231-03 Algebra 3/Trig C Cabral, E 309
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7	414-01 French 4 Khang, B 103	414-01 French 4 Khang, B 103	414-01 French 4 Khang, B 103	414-01 French 4 Khang, B 103	414-01 French 4 Khang, B 103	414-01 French 4 Khang, B 103

Course Ignore warnings

The course requests appear on the left side of the page, while the student's current schedule appears in a matrix format on the right side of the page.

On the **Course Requests** side of the page, primary and alternate requests are separated. You can click, drag, and drop requests between the primary and alternate requests to switch a request from primary to alternate, or vice versa.

5. In the **Course Requests** area, you can do the following:
 - Click  to remove a request from the list.
 - Click a course number to view details about the request. Requests that are not scheduled appear in **red**.
 - Select the **Allow over max** checkbox next to a course request if the system can ignore maximum enrollment numbers for that course when you reschedule.
 - Select the **Show courses excluded from scheduling** checkbox to show any of the student's requests for courses that are not scheduled.
 - To add course requests, you can either enter a list of specific course numbers and click **Add**, or click **Select** to select courses.
 - Click **Drop All** to delete all course requests.
 - Click **Update** to add any courses the student is currently scheduled in to the list of course requests.
 - To schedule a course request, click and drag the request to the matrix. As you hover over the request, the available sections for the request are highlighted in the matrix. If you drag and drop the course over to the schedule, the matrix displays when the course will be taken each period and day in the schedule.

On the **Student Schedule** side of the page, the student's current schedule appears:

Student Schedule (100% scheduled - Class credits: 7.0) << List view

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

	A	B	C	D	E	F
1	032-03 College English 11 Brabants, N 216	032-03 College English 11 Brabants, N 216	032-03 College English 11 Brabants, N 216	032-03 College English 11 Brabants, N 216	032-03 College English 11 Brabants, N 216	032-03 College English 11 Brabants, N 216
2	031-03 American Literature C Stevens, J 212	031-03 American Literature C Stevens, J 212	031-03 American Literature C Stevens, J 212	031-03 American Literature C Stevens, J 212	031-03 American Literature C Stevens, J 212	031-03 American Literature C Stevens, J 212
3	110-02 American Studies 2 H Gold, A 202	110-02 American Studies 2 H Gold, A 202	110-02 American Studies 2 H Gold, A 202	110-02 American Studies 2 H Gold, A 202	110-02 American Studies 2 H Gold, A 202	110-02 American Studies 2 H Gold, A 202
4	050-02 Humanities H O'Brien, R 224	050-02 Humanities H O'Brien, R 224	050-02 Humanities H O'Brien, R 224	050-02 Humanities H O'Brien, R 224	050-02 Humanities H O'Brien, R 224	050-02 Humanities H O'Brien, R 224
5	231-03 Algebra 3/Trig C Cabral, E 309	231-03 Algebra 3/Trig C Cabral, E 309	231-03 Algebra 3/Trig C Cabral, E 309	231-03 Algebra 3/Trig C Cabral, E 309	231-03 Algebra 3/Trig C Cabral, E 309	231-03 Algebra 3/Trig C Cabral, E 309
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7	414-01 French 4 Khang, B 103	414-01 French 4 Khang, B 103	414-01 French 4 Khang, B 103	414-01 French 4 Khang, B 103	414-01 French 4 Khang, B 103	414-01 French 4 Khang, B 103

Course: Ignore warnings

- At the top of the **Student Schedule** side of the page, do the following:
 - Select the **Term code** to determine which term you want to view the schedule for.
 - At the **Work mode** field, select **Manual** to manually drag and drop courses between periods and days on the matrix to find the best place for each course on the student's schedule.
 - Or, select **Auto-Shuffle** to have the system determine the next best place to put a course in the student's schedule, as you move course requests onto the schedule.
 - Select the **Allow conflicts** checkbox to if you want to schedule the student in any course section you select, despite any conflicts with course sections on his or her schedule.
 - Select the **Allow all over max** checkbox to allow the student to be scheduled in any class, even if the maximum enrollment has been exceeded.
 - Select the **Allow over inclusion ratio/count** checkbox if you want to schedule the student in any inclusion section of a course you select, even if the maximum ratio or count for inclusion students has been reached.

Note: This checkbox appears only if the inclusion ratio/count is more than zero in the scheduling scenario preferences.

- Then, within each cell, view the current course scheduled for that day and period. Click to drop a course, or click to lock or unlock the course on the student's schedule.


If a cell is empty, meaning no course is scheduled during that period and day, you can do the following:

- Click, drag, and drop a course from the list of student's course requests.
 - Click in the empty cell. The Schedule Master pick list appears, from which you can [add a course section](#).
 - Type a number in the **Course** field at the bottom of the page, and click **Add**. Select the **Ignore warnings** checkbox if you want to schedule the student in the course despite any conflicts.
 - Click **Select** to select a section from the Master Schedule pick list.
 - Click **Drop All** to clear the student's schedule.
 - Click **Reschedule** to [create a new schedule for the student based on the list of course requests](#). If you want to reschedule, you can click **Lock All** to lock any sections currently on the student's schedule. The system reschedules the student around the courses you lock on the student's schedule.
8. At the bottom of the **Student Schedule** side of the page, click **Post** to save all changes you made to the student's schedule. Or, click **Revert** to return the student's schedule to the schedule that was previously saved.

Drop Courses from a Student's Schedule

You can drop courses from a student's schedule at any time during the year.

To drop courses from a student's schedule:

1. Log on to the School or Build view.
2. Click the **Student** tab.
3. Search for and select the student.
4. Click the **Schedule** side-tab. The student's current schedule appears.
5. On the **Schedule** side-tab, click **Workspace**. The Workspace displays the student's schedule. Click **List view** or **Matrix view**.
6. Do one of the following:
 - In the List view, select the course, and click **Drop**.
 - In the Matrix view, select the course on the matrix and click .
7. Do one of the following:
 - [Add a course](#).
 - Click **Post** to post the new schedule.
 - Click **Revert** to revert to the old schedule (the student's schedule after the last post).

Add Courses to a Student's Schedule

You can add a course to a student's schedule at any time during the year.

To add a course to a student’s schedule:

1. Log on to the School or Build view.
2. Click the **Student** tab.
3. Search for and select the student.
4. Click the **Schedule** side-tab. The student’s current schedule appears.
5. On the **Schedule** side-tab, click **Workspace**. The workspace displays the student’s schedule. Depending on how you last viewed a workspace for a student, either the List view or Matrix view appears.
6. Do one of the following:
 - Enter a specific course and section number in the **Course** field, and click **Add**.

Note: Select the **Ignore warnings** checkbox if you want to schedule the student in the course despite any conflicts.

- If you are using the Matrix view, click in an empty cell on the matrix. Select a section that is available for that cell.
- Click **Select** to select a course section from the master schedule. The Master Schedule dialog box appears:

Course	<input type="text"/>	<input type="button" value="OK"/>	Team	All ▼	Requested only	<input type="checkbox"/>
Period	All ▼		House	All ▼	Valid sections only	<input checked="" type="checkbox"/>
Track ID	All ▼		Platoon	All ▼	Allow conflicts	<input type="checkbox"/>
Term	All ▼		Order by	Course ▼	Allow all over max	<input type="checkbox"/>
Department	All ▼		Use reserve seats	<input checked="" type="checkbox"/>	Allow over inclusion ratio	<input type="checkbox"/>

<	9: 13224-006 GEOMETRY H2	>	0 of 558 selected								
<input type="checkbox"/>	Course	Description	Teacher	Term	Schedule	Unrotated Schedule	Total	Max	Close?	SecType	Te
<input type="checkbox"/>	13224-006	GEOMETRY H2	Regner, LINDSAY MELINA	S2	1(A-B)		22	26	Y		
<input type="checkbox"/>	13224-007	GEOMETRY H2	Regner, LINDSAY MELINA	S2	1(F-G)		25	26	Y		
<input type="checkbox"/>	13234-001	GEOMETRY	Regner, LINDSAY MELINA	S1	1(C,D1)		21	23	Y		
<input type="checkbox"/>	13234-004	GEOMETRY	FLEMING, ELAINE RODRIGUES DA CUNHA	S2	1(A-B)		18	23	Y		
<input type="checkbox"/>	13234-005	GEOMETRY	TURCHINETZ, CAITLYN ELIZABETH	S2	1(F-G)		19	23	Y		
<input type="checkbox"/>	13234-006	GEOMETRY	Regner, LINDSAY MELINA	S2	1(D2,E2)		19	23	Y		
<input type="checkbox"/>	13614-002	ADVANCED ALGEBRA H	FLEMING, ELAINE RODRIGUES DA CUNHA	S2	1(F-G)		24	25	Y		
<input type="checkbox"/>	13614-003	ADVANCED ALGEBRA H	TURCHINETZ, CAITLYN ELIZABETH	S2	1(C,D1)		17	25	Y		

You can limit the course sections to choose from by selecting values at the **Course**, **Period**, **Track ID**, **Term**, **Department**, **House**, and **Team** fields. Select a value in the **Order by** field to change the way course sections are sorted.

You can do any of the following:

- Select **Requested only** to limit the course sections to only the courses the student originally requested.
- Select **Valid sections only** to limit the course sections to only courses that are open, belong to the student’s team, and have the appropriate section type for the student.

Managing Student Information

- Select **Allow conflicts** to schedule the student in any course section you select, despite any conflicts with course sections on his or her schedule.
 - Select **Allow all over max** to allow you to schedule the student in a course that has already reached its maximum enrollment number.
7. Select the course sections you want to add to the student's schedule.
 8. If you are using reserved seating, and the section has only reserved seats remaining, select the Use reserve seats checkbox to open a space in the section for the student.
 9. Click **OK**. If you did not select the **Allow Conflicts** checkbox, the system displays any warnings about conflicts the course sections you selected have with the student's current schedule.

Any course sections you add to the student's schedule appear with an asterisk (*). This means that you have not posted the course sections yet.

10. After you add the sections, click **Post**. The changes you made are now the student's active schedule.

Post a Student's Schedule

When you add or drop courses from a student's current schedule using the Workspace, you click **Post** to post the new schedule.

If the date you click **Post** falls within the number of days set by your district for aligning courses added to and dropped from a schedule, a dialog box matches any courses you dropped to courses you added:

Sections deleted	Sections replaced with	
E2F-1 STUDY E S1 1(5) 3(7) 6(2)	No matching records	<input type="button" value="Edit"/>

Use the dialog box to be sure the student's new schedule is balanced.

By default, the system aligns added and dropped sections by department.

Do one of the following:

- Click **Edit** to make an adjustment.
- Click **OK** to post the new schedule.
- Click **Cancel** to cancel the post action.

Note: If you drop a section of a course and add a different section of the same course, the 'Update transcripts to new section' dialog box appears. To move any grades from the original section to the new section on the student's transcript, select the **Update** checkbox.

Update Students' Course Requests on Their Schedule Page

Before you add and drop course sections from a student's schedule, you can update their course requests on the same page.

To update a student's course requests:

1. Log on to the School or Build view.
2. Click the **Student** tab.
3. Search for and select the student.
4. Click the **Schedule** side-tab. The student's current schedule appears.
5. On the **Schedule** side-tab, click **Workspace**. The Workspace displays the student's schedule and course requests. Depending on how you last viewed a workspace for a student, either the List view or Matrix view appears:

Course Requests						
<input type="checkbox"/> CrsNo	Description	SecType	Alternate?	Alt 1 > CrsNo	Alt 2 > CrsNo	Allow over max
<input type="checkbox"/> 423H*	Hon Chem Lab		N			<input type="checkbox"/>
<input type="checkbox"/> 512	French II		N			<input type="checkbox"/>
<input type="checkbox"/> 802	Wellness I		N			<input type="checkbox"/>
<input type="checkbox"/> 804	Frosh/Soph PE		N			<input type="checkbox"/>
<input type="checkbox"/> 523	Spanish III		N			<input type="checkbox"/>
<input type="checkbox"/> 332H	Hon Algebra II - Trig		N			<input type="checkbox"/>
<input type="checkbox"/> 423H	Hon Chemistry		N			<input type="checkbox"/>
<input type="checkbox"/> 204H	Hon US History I		N			<input type="checkbox"/>
<input type="checkbox"/> 122H	Hon English II		N			<input type="checkbox"/>

Course number

6. You can do the following:
 - Enter a specific course number, and click **Add**.
 - Click **Select**. The Pick Course dialog box appears. Select the courses you want to add to the student's requests, and click **OK**.
 - Select the course requests you want to delete, and click **Drop**.
 - Click **Update** to add any courses the student is currently scheduled in to the list of course requests.
 - Select **Allow over max** for any course you want [the system to schedule the student in](#) even if the maximum enrollment has been reached.

Note: When you [reschedule the student](#), the system deletes his or her current schedule and creates a new one based on course requests.

Reschedule Students Based on Course Requests

After you [add or drop student requests](#), you might want to reschedule the student. Doing so deletes his or her current schedule and attempts to schedule the student in as many requested courses as possible.

Note: The system considers any load-type scheduling rules and alternate course requests when it reschedules a student. For example, if a scheduling rule says that a student cannot be scheduled in a specific teacher's class, the system knows not to schedule him or her with that teacher during the rescheduling process.

To reschedule students:

1. Log on to the School or Build view.
2. Click the **Student** tab.
3. Search for and select the student.
4. Click the **Schedule** side-tab. The student's current schedule appears.
5. On the **Schedule** side-tab, click **Workspace**. The Workspace displays the student's schedule and course requests:

The screenshot shows the 'Student Schedule (100% scheduled - Class credits: 7.0)' workspace for student Aaronson, Grace. It features a navigation sidebar on the left with tabs for Details, Contacts, Attendance, Conduct, Transcript, Assessments, Schedule, Workspace (selected), Attributes, Change History, Conflicts, Requests, Graduation Progress, Membership, Transactions, and Documents. The main area is divided into two sections: 'Student Schedule' and 'Course Requests'.

Course	Description	Term	Schedule	Unrotated Schedule	Teacher	Classrm	SecType	Team	House	Pistol
032-03	College English 11	FY	1(A-F)		Brabant, Nicole	216				
031-03	American Literature C	FY	2(A-F)		Stevens, Jenna	212				
110-02	American Studies 2 H	FY	3(A-F)		Gold, Ann	202				
050-02	Humanities H	FY	4(A-F)		O'Brien, Rene	224				
231-03	Algebra 3/Trig C	FY	5(A-F)		Cabral, Elizabeth	309				
031-01	American Literature C	FY	6(A-F)		Phillips, Thomas	215				
414-01	French 4	FY	7(A-F)		Khang, Brandon	103				

Number	Description	SecType	SecNo	TP/View	Periods per cycle	Staff > Name	TermCode	Alternate?	AltPri	Inclusion?	Alt 1 > CrsN
031	American Literature C			1/1	6.0000			N	0	N	
032	College English 11			1/1	6.0000			N	0	N	
110	American Studies 2 H			1/1	6.0000			N	0	N	
231	Algebra 3/Trig C			1/1	6.0000			N	0	N	

In the List view, the student's current schedule appears at the top of the page. In the Matrix view, the student's current schedule appears on the right of the page. Any course section that has not yet been posted appears with an asterisk (*) next to the section number. You can [add](#) and [drop](#) courses at any time.

In the List view, the student's course requests appear at the bottom of the page. In the Matrix view the course requests appear on the left of the page. Any request in **red** is a course the system could not schedule the student in. You can add and delete course requests.

6. To reschedule a student, verify that all of his or her course requests appear below **Course Requests**, and click **Reschedule**.

Note: If your school uses dynamic teams and houses, the system asks if you want to keep the student in his or her current house or team.

The system deletes the student's schedule and attempts to schedule him or her in the requested courses. The system clears any student load conflict reasons, and replaces them with new information.

All courses the system can schedule the student in appear at the top of the page with an asterisk (*) next to the course number. The schedule is not permanent until you click **Post**.

View Changes to a Student's Schedule

A student's schedule can go through many changes during the current school year. Courses might be dropped or added, or both.

To view the changes made to a student's schedule:

1. Log on to the School view.
2. Click the **Student** tab.
3. [Search for and select the student](#).
4. Click the **Schedule** side-tab, then click **Change History**. A list of any changes made to the student's schedule appears.
5. To print a report of the changes, on the **Reports** menu, click **Student Schedule Change History**.
6. Enter the report parameters. The report displays in the format you specify.

View Graduation Progress for a Student

View a student's graduation progress while entering requests to determine his or her progress in completing graduation requirements.

To view a student's graduation progress status:

1. Log on to the School view.
2. Click the **Student** tab.
3. Find and select the student.
4. Click the **Schedule** side-tab, then **Graduation Progress**. The student's graduation summary appears.
5. In the **Completed Status** column, in addition to the percent of credits in progress and completed, view the total percent of credits the student is requesting for next year:

Managing Student Information

Programs of Study		High School					
Code	Description	Required unit	Credits waived	Credits completed	Credits in progress	Credits requested	Completed Status
English Freshman		5.0	2.0	5.0	0.0	5.0	✓
English Junior		5.0		0.0	0.0	0.0	0% completed
English Senior		5.0		0.0	0.0	0.0	0% completed
English Sophomore		5.0		5.0	0.0	0.0	✓
Fine & Practical Arts		5.0		0.0	0.0	0.0	0% completed
+ Foreign Language		5.0		0.0	0.0	0.0	0% completed
Health Education		2.5		2.5	0.0	0.0	✓
Local History & Government		2.5		0.0	0.0	0.0	0% completed
Mathematics		15.0		15.0	0.0	0.0	✓
Physical Education		5.0		2.5	0.0	0.0	50% completed
Science		10.0		0.0	0.0	0.0	0% completed
Social Studies		7.5		5.0	5.0	0.0	67% completed
US History		5.0		0.0	5.0	0.0	0% completed
Total		100.0	2.0	35.0	5.0	5.0	37% completed 42% in progress 42% requesting

Managing Student Requests for Next Year

As a counselor or administrator, Aspen includes several ways to manage student requests for the next school year:

- [Enter student requests in the School view](#). For example, if students at your school pass in request sheets, they can be manually entered.
- [Counselors can enter recommendations for students and groups of students, and convert recommendations entered by teachers into requests for students](#).
- Students can [enter requests online in the Student portal](#). Then, counselors or administrators can [edit and approve the requests](#).
- [Counselors can review recommendations and requests for students in the School view](#).

Enter Requests for a Student Using the Options Menu

You can enter several course requests for a student using the **Options** menu.


For example, your students might submit request sheets to the guidance office, who enters requests into Aspen.

To enter a student's requests:

1. Log on to the School or Build view.

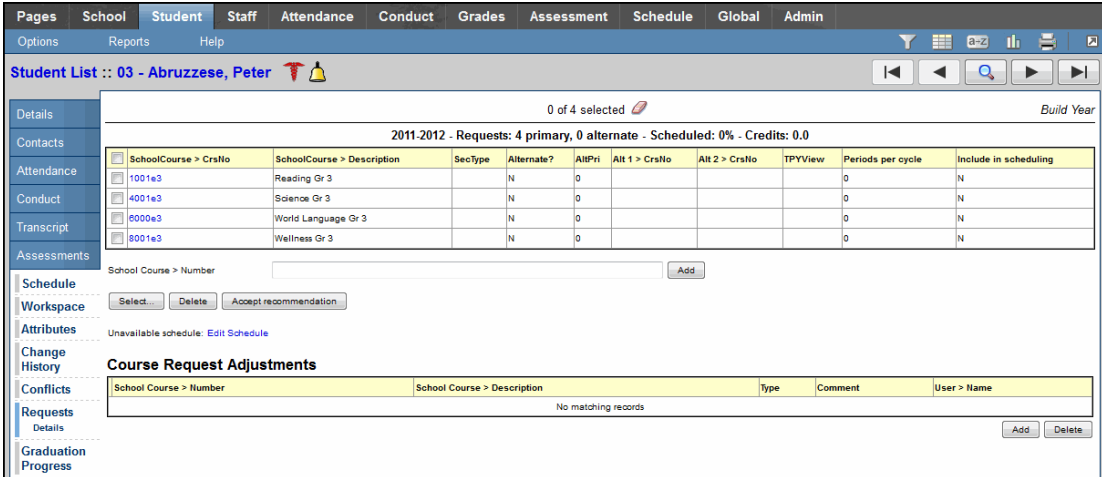
Note: In the Staff view, you can only view a student's requests.

2. Do one of the following:
 - If you are entering the student's requests for next year, go to the Build view, and click the **Student** tab. Then, click the **Requests** side-tab.
 - If you are entering requests for a student for the current year or next year, click the **Student** tab. Click the **Schedule** side-tab. To enter requests for the current year, click **Requests** or

Workspace. To enter next year's requests, click **Requests**, and be sure to click the **Filter** icon  , and select **Build Year**.

Note: If you select the **Build Year** filter, courses for the student's current school and year appear in the School Course pick list. To enter requests for students for next year, especially if they are attending a new school, use the Build view.

3. Select a student, and click the **Requests** side-tab. The requests page for that student appears:



Student List :: 03 - Abruzzese, Peter

0 of 4 selected Build Year

2011-2012 - Requests: 4 primary, 0 alternate - Scheduled: 0% - Credits: 0.0

School Course > CrsNo	School Course > Description	SecType	Alternate?	AltPri	Alt 1 > CrsNo	Alt 2 > CrsNo	TPYView	Periods per cycle	Include in scheduling
1001e3	Reading Gr 3		N	0				0	N
4001e3	Science Gr 3		N	0				0	N
8000e3	World Language Gr 3		N	0				0	N
8001e3	Wellness Gr 3		N	0				0	N

School Course > Number

Workspace

Attributes: Unavailable schedule. [Edit Schedule](#)

Course Request Adjustments


School Course > Number	School Course > Description	Type	Comment	User > Name
No matching records				

4. Do one of the following:
- Click **Select** on the page.
 - On the **Options** menu, click **Add**.

The School Course Pick List appears:

Grade level

Department



0 of 32 selected 

<input type="checkbox"/>	CrsNo	Description	Department
<input type="checkbox"/>	026	SAT Prep Eng	English
<input type="checkbox"/>	030	American Literature Pre AP	English
<input type="checkbox"/>	031	American Literature C	English
<input type="checkbox"/>	032	College English 11	English
<input type="checkbox"/>	033	English 11	English
<input type="checkbox"/>	110	American Studies 2 H	Social Studies
<input type="checkbox"/>	110AP	American Studies 2 AP	Social Studies
<input type="checkbox"/>	111	American Studies 2 C	Social Studies
<input type="checkbox"/>	113	American Studies 2	Social Studies
<input type="checkbox"/>	231	Algebra 3/Trig C	Math





Tip: Press **CTRL+F**, and type a specific course number to jump directly to that course, instead of moving through the pages of courses.

Also, note that if a student is associated with more than one school on the **Schools** side-tab for the build year, select the school you want to request courses from at the top of the School Course Pick List. If you select the student's primary school, you can enter the student's requests for courses at both his or her primary and secondary schools. Alternatively, if you log on to the student's secondary school, you can only enter requests for courses at the secondary school. The **School Name** column displays which school a request is entered for.

Note: When entering requests for courses in a student's secondary school, the option to request a specific section is provided. Requesting specific sections allows the system to automatically reserve the time required by the secondary school. The ability to select specific secondary school sections is available if:

- The student's secondary school defines a shared build scenario.
 - Both the primary and secondary schools have set bell schedules in the system.
5. To filter the list of courses, select a specific department at the **Department** drop-down.
 6. Select the checkboxes next to each course the student is requesting. You can click **Next**  and **Previous**  to move from page to page to select many courses.
 7. Click **OK**. The system adds all of the courses to the list of the student's course requests.

- Click the course number of any of the requests to define if the request is an alternate, or to identify alternate requests if the student does not get into that course. You can also identify a specific section type this student needs for a course, such as Bilingual:

School Course > Number *	EL-3R&L 
Section type	<input type="text"/>
Is inclusion section?	<input type="checkbox"/>
Content term code	<input type="text"/>
Is optional?	<input type="checkbox"/>
Is alternate course?	<input type="checkbox"/>
Alternate course priority	0
Alternate course type	<input type="text"/>
School Course > Number	EL-3R&L
School Course > Description	3rd Grade Reading and Literature
Alternate Course 1 > Number	<input type="text"/> 
Alternate Course 2 > Number	<input type="text"/> 
Staff > Name	<input type="text"/> 
Section Number	<input type="text"/>
Term code	<input type="text"/>

Note: At the **Alternate course type** field, you can determine how the system should handle this request. By default, all alternate requests are **Substitute**; the system uses them to replace students' primary requests when students cannot be scheduled into them. Or, select **Auto-fill** for the scheduler to use the alternate request to fill in any holes that are not occupied by primary requests in the student schedule.

The student's request percentage appears at the top of the page. Use this percentage to determine if the student has requested too few or too many courses.

Entering Requests for Teacher Recommendations

After teachers enter their recommendations for which courses their students should take next year, counselors and administrators can do any of the following to accept the recommendations, converting them into student requests.

- If your school uses online course requesting for students, students can view and accept the recommendations in the Student view.
- Your school's [guidance counselors can enter their own recommendations for groups of students at the same time.](#)

- Your school's [guidance counselors can accept teacher and other staff recommendations and turn them into requests for groups of students or for academic tracks, and specific track selections](#).
- Your school's guidance counselor can [accept recommendations for each student, one-at-a-time, while reviewing a student's requests](#).

Add Course Recommendations for Several Students

As a counselor or administrator, you can enter course recommendations for several students at one time for next year.

The recommendations appear in the Course Requests Adjustment area of each student's Requests page.

Then, you need to accept the course recommendations to turn them into requests for either [groups of students](#), or [one student at a time](#).

To add course recommendations for several students:

1. Log on to the School view.
2. Click the **Student** tab.
3. On the **Options** menu, click **Requests**, then **Add Request Recommendations**. The Handle Recommendations dialog box appears:

School Year Context > Year ID: 2013-2014

Type: Recommended

Students

Selection

Grade level

Snapshots

Selected students: 0

Course Numbers:

Note: The school year defaults to the next school year.

4. At the **Type** field, select one of the following:

- **Recommended:** This creates recommendations for the courses you enter or select at the **Course Numbers** field, and displays **Recommended** in the **Type** column.
 - **Excluded:** This creates recommendations for the courses you enter or select at the **Course Numbers** field, and displays **Excluded** in the **Type** column.
 - **Required:** This creates required recommendations for the courses you enter or select at the **Course Numbers** field, and displays **Required** in the **Type** column.
 - **Requirement Waived:** This creates recommendations for the courses you enter or select at the **Course Numbers** field, and displays **Requirement Waived** in the **Type** column.
5. Select one of the following to determine which group of students you want to enter the recommendations for:
 - **Selection:** A list of students appears. Select the students you want to enter recommendations for.
 - **Grade level:** A list of grade levels appears. Select the grade levels you want to recommend the courses for.
 - **Snapshots:** A list of snapshots appears. Select the snapshots of students you want to recommend the courses for.
 6. In the **Course Numbers** field, type the course numbers, separated by commas, or click **Select** to select the courses from a list.
 7. Click **OK**. The recommended courses appear in the **Course Request Adjustment** area of each student's Request page. The **Type** column displays if the recommendations are recommended, excluded, required, or requirement waived.

To turn the recommendations into student requests, do the following:

- Allow students to view the recommendations and enter requests in the Student view.
- [Accept recommendations](#).

Accept Recommendations to Create Course Requests for Several Students

After teachers or [school staff members enter course recommendations](#) for their students for the coming year, you can convert those recommendations to students' request lists by accepting them.

To add recommendations to student request pages:

1. Log on to the School view.
2. Click the **Student** tab.
3. On the **Options** menu, click **Requests**, then **Accept Request Recommendations**. The Handle Recommendations dialog box appears:

The screenshot shows a web form with the following elements:

- School Year Context > Year ID:** A text input field containing "2011-2012".
- Selection Mode:** A dropdown menu with "Students" selected.
- Students:** A section with three radio buttons: "Selection", "Grade level" (which is selected), and "Snapshots".
- Selected students:** A text field showing "310".
- Buttons:** "OK" and "Cancel" buttons at the bottom left.

Note: The next school year appears in the **School Year Context Year ID** field.

4. At the **Selection Mode** field, select **Students** to accept recommendations and create requests for a group of students, or select **Academic Track** to accept recommendations for courses in a specific academic track and track selection. Depending on what you select, you must select the group of students you want to accept recommendations for (by selection, grade level, or snapshot), or the academic track and track selection (optional) you want to accept recommendations for.
5. Click **OK**.

Approve Requests Entered by Students Online

When students enter their course requests for next year in the Student portal, you can manage those requests in the School view.

To approve online student requests:

1. Log on to the School view.
2. Click the **Student** tab.
3. Click the **Schedule** side-tab.
4. Click the **Requests** side-tab. The student's requests appear. [You can enter and manage student requests and adjustments.](#)
5. In the upper-left corner of the page, click **Entry mode>>** to view and use the requests page the student uses:

Student List :: 10-Ahern, Rebecca

2013-2014 - Requests: 6 primary, 1 alternate - Scheduled: 7% - Credits: 5.0

Instructions
All students must select a minimum of five courses.

Primary requests


Subject area	SchoolCourse > CrsNo	SchoolCourse > Description	SecType	Alternate?	AltPri	Alt 1 > CrsNo	Alt 2 > CrsNo	Credit
Select... Electives	093	Writing Seminar		N	0			0.5
Select... English	356	Forensic Science		N	0			0.5
Select... Foreign Language	033	English 11		N	0			1.0
Select... Math	433	Spanish 3		N	0			1.0
Select... Science	323	Action Chemistry		N	0			1.0
Select... Social Studies	113	American Studies 2		N	0			1.0

Alternate requests

Subject area	SchoolCourse > CrsNo	SchoolCourse > Description	SecType	Alternate?	AltPri	Alt 1 > CrsNo	Alt 2 > CrsNo	Credit
Select... Special Education	959	Academic Support 11-12		Y	1	957	960	1.0

Notes for counselor
Mrs. Smith, I don't have the prerequisite so I can't request it, but Mrs. Hope recommended Honors Trig. What should I do?

Approve Approved time: 1/14/2013 12:28 PM Last posted time: 1/14/2013 12:28 PM

Note: If  appears next to the subject area, the student did not select the course recommended by his or her current teacher. Click **Select** to view the course the student selected in comparison to the course or courses recommended by the teacher.

- You can edit any requests the student has made. Also, view any **Notes for the counselor** they have typed.
- After reviewing and making any necessary changes, to approve the student's requests, select the **Approve** checkbox at the bottom of the page. After you approve the student's requests, he or she can no longer make changes using the Student portal.

Review Course Recommendations and Requests for a Student

Counselors or administrators can review and accept recommendations, and create course requests for one student at a time in the School view.

To review course recommendations and requests for a student:

- Log on to the School view.
- Click the **Student** tab.
- Search for and select a student, and click the **Schedule** side-tab.
- On the **Schedule** side-tab, click **Requests**. Any course recommendations entered by teachers or staff members appear in the **Course Request Adjustments** area of the Request page:

Managing Student Information

The screenshot shows the 'Student List' interface for student John Abbott. The top navigation bar includes tabs for Pages, School, Student, Staff, Attendance, Conduct, Grades, Assessment, Schedule, Global, and Admin. The main header displays 'Student List :: 07-Abbott, John' and '0 of 2 selected'. Below this, a summary bar indicates '2013-2014 - Requests: 2 primary, 0 alternate - Scheduled: 0% - Credits: 2.0'. The interface is divided into several sections: 'Attendance' with a table of course requests, 'Assessments' with an 'Add' button, 'Academics' with 'Select' and 'Delete' buttons, 'Schedule' with an 'Unavailable schedule' message, and 'Workspace' containing a 'Course Request Adjustments' table. This table lists requests for Honors Geometry, Spanish 2, English 7 H, and Speech/Lang 9. At the bottom right, there are buttons for 'Add', 'Accept recommendation', and 'Delete'.

School Course > CrsNo	School Course > Description	SecType	Alternate?	AltPr	Alt 1 > CrsNo	Alt 2 > CrsNo	TPY/View	Periods per cycle	Include in scheduling
013	English 9		N	0				0	N
210	Honors Geometry		N	0				0	N

School Course > Number	School Course > Description	School Course > Department	School Course > Grade level	School Course > Academic level	Type	Comment	User > Name
<input type="checkbox"/> 210	Honors Geometry	Math	10	CP	Recommended		Administrator, Joe
<input checked="" type="checkbox"/> 432	Spanish 2	World Language	10	Std	Required		Administrator, Joe
<input checked="" type="checkbox"/> MS070	English 7 H	English	07	H	Excluded		Administrator, Joe
<input checked="" type="checkbox"/> MS993	Speech/Lang 9	Special Education	09	Mod	Requirement Waived		Administrator, Joe

5. To add additional recommendations, click **Add**.
6. To delete a recommendation, select the checkbox next to the recommendation, and click **Delete**.
7. To accept recommendations and make them requests, select the checkbox next to each recommendation, and click **Accept recommendation**. The recommendations now also appear as **Requests** at the top of the page.

At the top of the page, you can [add and manage requests for the students](#).

Working With Student Enrollment Information

Enrollment information is a vital piece of a student record. A student's enrollment information might include the dates and reasons for the following:

- [When the student enrolls in your school.](#)
- [If the student completely withdraws from your district.](#)
- [If the student transfers from your school to another school in your district.](#)
- [If the student's status changes from active. For example, a student who reaches the maximum age at your school might become inactive.](#)
- [If the student is promoted or demoted to a different year of graduation.](#)
- [A student is associated with another school. See \[Create Secondary School Associations\]\(#\).](#)

Also, you can [view and manage any groups](#) a student is a member of.

Register a Student

Register students in your district, or school from the Student List. You can register students who are new or who are returning to your school.

To register students:

1. Click the **Student** tab.
2. On the **Options** menu, click **Registration**, and **Register Student**. The Student Registration wizard displays Step 1.

Student Registration: Select Student **Step 1 of 4**

New student

First name	<input type="text" value="Jonathan"/>
Last name	<input type="text" value="Barresi"/>
Gender	<input type="text" value="M"/>
Date of birth	<input type="text" value="02/01/2002"/> <input type="button" value="Calendar"/> Age 12

New family member

< Back Next > Finish Cancel

3. Type the student's **First Name**, **Last Name**, select a **Gender**, and type or click to enter a **Date of birth**.
4. If this student is related to another student in the district, click **New family member** and a box with additional fields appears. Enter any required fields (determined by your root organization's preferences). Enter a name at the **Related Student** field and click **Search**. The Student Pick List appears. Find the related student and click **OK**. Then, select the **Relationship** to the student you are registering (such as sibling). Click **Next**.

When you click **Search for related student**, any information (such as phone number and address) your district chooses to copy from the related student to the new student appears in Step 2.

5. If the new student's information matches an active student in the district, a pop-up appears listing the name and information of the matching student and the following message:

Managing Student Information

Name	Gender	DOB	LASID	Grade	EnrStatus	Last Withdrawal	Contact
Barresi, Jake	M	02/01/2002	2620002285	06	Active	-	Belmonte Middle School , Abbotsford School District 34

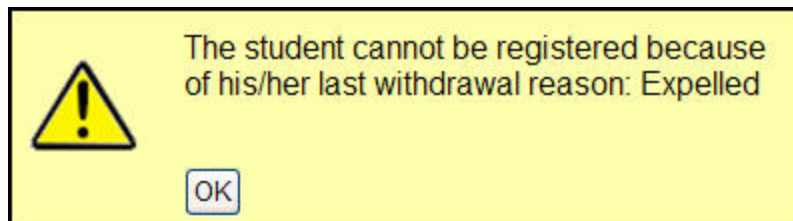
The name of the matching student's school appear under **Contact**. Click for additional information, such as a contact name and phone number. Click **Cancel** to enroll a different student. If you click **OK**, Step 1 of the Student Registration wizard appears with a warning message:

The selected student is already active.

Click **Cancel** to enroll a different student. Aspen does not allow you to register a student who is already active.

Note: The selection criteria specified in your root organization's Membership preferences determine the matching student results that appear in the Student Pick List.

- If this student is a returning student, meaning he or she was active in your district or school in the past but is now inactive, use the same registration process as for a new student.
- However, if the student withdrew from your district or school due to a withdrawal reason defined by your district in the **Student Registration Restriction** preference (such as expulsion), then a warning message might appear:



System administrators can set a user role, usually the Enrollment Manager, to override this restriction in the user role details.

Note: If a user enters the name of an active ["private" student](#), Aspen will find a match but will not show the user any details about the student or allow the student to be enrolled. (Your root organization's Student preference determines whether you can flag students as private.) The following message appears:

Based upon the data entered, a student match has been found; however, the matched student cannot be enrolled at this time. Please select Cancel to return to the previous screen.

If you are attempting to enroll a brand new student, please select Next to continue the registration process.

Close


The Student Registration wizard displays Step 2:


Student Registration: Demographics Step 2 of 4

General | **Address**

First name	Michael
Middle name	Derek
No middle name flag	<input type="checkbox"/>
Last name	Wallace
Suffix	
Gender	M
Date of birth	1/23/1990
City/Town of birth	Weymouth
Phone 01	781-555-5541
Phone 02	
Phone 03	
Homeroom	101
Home language	English
Calendar	Standard

< Back Next > Finish Cancel

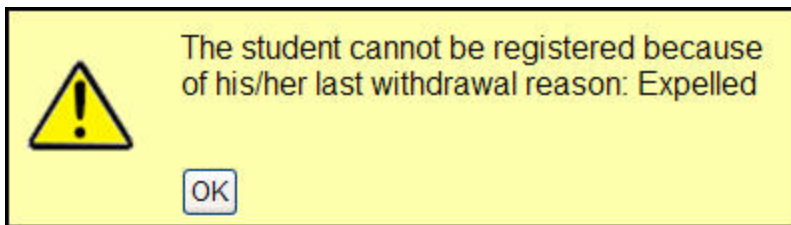
8. Enter general demographic information for the student.
9. Click the **Address** tab to enter the student's address information. You can type an address, or click  to select an address in your system. You can also click **Search Grid Codes** to search for an address close to the one you typed.
10. Click **Next**. The Student Registration wizard displays Step 3:

Note: If you do not see the student in the Student List after exiting the Student Registration wizard, click  and select **All Records** (if logged on to the District view) or **All Students** (if logged on to the School view). The default filter for the Student List excludes records for preregistered students and other students who are listed as currently inactive.

Re-register a Returning Student

Register a student who was active in your district or school in the past, but is now inactive, using the same process you use when registering a new student. See [Register a Student](#).

However, if the student withdrew from your district or school due to a withdrawal reason set in the **Student Registration Restriction** preference, some users might be restricted from registering the student. For example, if the Student Registration Restriction is set to Expelled, then the following warning message appears:



System administrators can set a user role, usually the Enrollment Manager, to override this restriction in the user role details.

To allow a user role to override the student registration restriction:

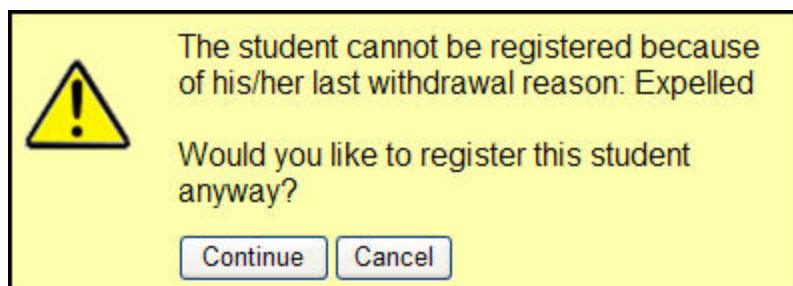
1. Log on to the District or Intermediate Organization view.
2. Click the **Admin** tab.
3. Click the **Security** side-tab.
4. Select the checkbox for a role, such as the Enrollment Manager, and click **Details**. The user role's details page appears:

Managing Student Information

General		Navigation					
Name *	Enrollment Manager						
Active directory ou name							
HQ view	<input checked="" type="checkbox"/>	School view	<input checked="" type="checkbox"/>				
Area view	<input type="checkbox"/>	Staff view	<input checked="" type="checkbox"/>				
District view	<input type="checkbox"/>	Health view	<input type="checkbox"/>				
		Build view	<input type="checkbox"/>				
Special Ed. view	<input type="checkbox"/>	Personnel view	<input type="checkbox"/>				
		Student view	<input type="checkbox"/>				
		Family view	<input type="checkbox"/>				
Category Student							
System Table	C	R	U	D	G	M	Other
504 Plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Archive students <input checked="" type="checkbox"/> Register students <input checked="" type="checkbox"/> Transfer students <input checked="" type="checkbox"/> Withdraw students <input type="checkbox"/> Change status/YOC for students <input type="checkbox"/> Student address grid code override
Student Alert	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Set legal alerts <input type="checkbox"/> Set medical alerts <input type="checkbox"/> Set other alerts
Student Assessment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Student Attendance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Student Class Attendance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Student Conduct Incident	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Override conduct restrictions
Student Contact	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Student Course Request	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Allow course maximum override
Student Enrollment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Directly add enrollment records <input checked="" type="checkbox"/> Override enrollment restrictions

5. Click the **Category** drop-down to select **Student**.
6. For the Student Enrollment system table, go to the last column titled **Other**. To allow this role to register any student, including students who have been expelled, select the **Override registration restrictions** checkbox.
7. Click **Save**.

When a user with this role registers a previously expelled student, the following warning appears, but he or she will be able to continue with the registration:







Withdraw a Student

Withdraw a student from your school who will no longer be in your district. For example, you might withdraw a student who dropped out of school, or who moved to another state.

To withdraw a student:

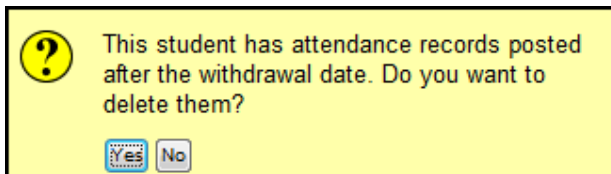
1. Log on to the District, Intermediate Organization or School view.
2. Click the **Student** tab.
3. [Search for and select the student.](#)
4. On the **Options** menu, click **Registration**, then **Withdraw Student**. The Withdraw Student pop-up appears.
5. Use the following table to enter information in the fields:

Field	Description
Name	Click  to select the student from the list that appears.
Current Primary School	The school name will automatically appear once the student is selected.
Date	Type the date, or click  to select the date the student is being withdrawn from school.
Code	<p>Click  to select the code for the student's withdrawal records. This code might be used for district informational purposes.</p> <p>For example, your district might use Transferred within the same school for the reason this student is withdrawn.</p>
Reason	<p>Click  to select the reason code.</p> <p>For example, your district might use Expelled for the reason this student is withdrawn.</p>
Status	<p>Click this drop-down to select the new enrollment status code for the student who is withdrawing. This status might be used for state reporting purposes.</p> <p>For example, your state status might be Drop Out.</p>
Disable related user accounts	<p>Select this checkbox to disable the student's and his or her contacts' Aspen user accounts. This denies their access to the Student and Family portals.</p> <div data-bbox="584 1224 1429 1346" style="border: 1px solid black; background-color: #e6f2ff; padding: 5px;"> <p>Note: If the contact is shared with another active student, the contact's user account will not be disabled.</p> </div> <div data-bbox="584 1367 1429 1488" style="border: 1px solid black; background-color: #e6f2ff; padding: 5px;"> <p>Note: You cannot disable the user account of a student that is actively cross-enrolled in one or more other schools.</p> </div>
Create a former school association	<p>This checkbox appears if specified in your root organization's Membership preferences. Select this checkbox to create a former school association record for this student's withdrawal. The record appears on the Student tab, Membership side-tab, School sub side-tab. From the withdrawal date until the end of the school year, the student will have a "former" student status.</p>

Note: When you withdraw a student and enroll the student in another school within the district in the same year, the system creates a former school association for that year so that you can see the students' records from the former school. Depending on your root organization's Membership preferences, Aspen can automatically create a former school association record upon the student's withdrawal.

6. Click **OK**.

If a student's membership record contains a record later than the date you entered for the withdrawal, Aspen displays the following warning :



To delete the later record, click **Yes**. Otherwise, click **No**, and you can edit the date you have entered for this withdrawal.

Note: If a cross-enrolled student withdraws from a school, a warning message appears to tell the user the student is enrolled at another school:

Withdraw Student

The student's enrollment status cannot be adjusted because the student has one or more active cross-enrollments.

Note: If a cross-enrolled student withdraws from the primary school, the student's status changes to "active – no primary" (as specified by your root organization's Membership and Student preferences).

Withdrawing a "Private" Student

Sometimes a student has special circumstances and is marked "private" to hide their demographic information from other schools in the district. If you withdraw a student who is marked private, the following pop-up appears:

Note: This student is currently marked as Confidential. Withdrawing the student will remove the Confidential status. Please select 'Cancel' if you wish to return to previous screen.

1. Click **Cancel** to return to the previous screen.
2. Click **Continue** to withdraw the student from the school. The following message appears:

This student is withdrawn and is no longer confidential.

Notes:

- If a private student is cross-enrolled at two schools and withdraws from either school, he or she is still marked private at the other school.
- Depending on your root organization's Membership and Student preferences, if you withdraw a cross-enrolled student from his or her primary school, Aspen either automatically withdraws the student from the secondary school or changes his or her enrollment status to another code, such as "Active No Primary."
- You are not able to withdraw a cross-enrolled student from the his or her secondary school.

Transfer a Student

Transfer a student from your school to another school in your district. Your Aspen system administrator defined how Aspen handles student transfers in your district's enrollment preferences.

Your district uses one of the following transfer processes:

- [The sending school pushes the student to the receiving school.](#)
- [The receiving school pulls students who have been prepared for transfer from the sending school by selecting the **Transfer Pending** checkbox.](#)
- [The receiving school can pull any students from the sending school; students are not prepared for transfer by selecting the **Transfer Pending** checkbox.](#)

Note: If your school uses address grid codes, and you transfer a student to a school not associated with the student's grid code, you are required to enter a **Reason**.

The screenshot shows a 'Transfer Student' dialog box with a red error message box overlaid. The error message reads: 'An entry reason is required when transferring outside of grid school.' The dialog box contains the following fields:

Local Identifier	
Local Identifier	79832
Name	Abrante

Withdrawal		Entry	
Current School	Adams School	Destination School	Crow Point High School North
Date	9/24/2008	Date	9/24/2008
Code	04	Code	R2
Reason		Reason	

Buttons: OK, Cancel

To push students to the receiving school:


1. Log on to the District, Intermediate Organization or School view.
2. Click the **Student** tab.
3. [Search for and select the student.](#)

4. On the **Options** menu, click **Registration**, then **Transfer Student**. The Transfer Student dialog box appears.
5. Enter the withdrawal information for the current school and the entry information for the destination school.
6. Click **OK**. The system transfers the student to the destination school, creating a W(withdrawal) enrollment record for the transferring school and an

To pull students from the sending school:

1. The sending school logs on to their School view.
2. Click the **Student** tab.
3. Search for and select the student.
4. Click the **Details** side-tab.
5. Select the **Transfer pending** checkbox and the student's new school at the **Transfer School** field on the student's detail page.
6. The receiving school logs on to their School view.
7. Click the **Student** tab.
8. Click the **Membership** side-tab, and then click **Enrollment**.
9. On the **Options** menu, click **Registration**, then **Transfer Student**.
10. Select the student from the list of pending transfers. The system transfers him or her to the destination school, creating a W (withdrawal) enrollment record for the transferring school and an E (entry) enrollment record for the destination school.
11. Enter the **Entry** information.
12. Click **OK**.

To pull students from the sending school, unrestricted:

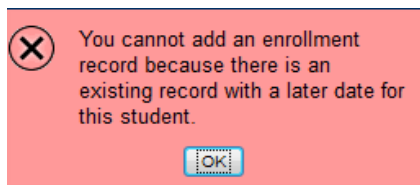
1. The receiving school logs on to their School view.
2. Click the **Student** tab.
3. On the **Options** menu, click **Registration**, then **Transfer Student**.
4. Do one of the following:
 - Type the student's **LASID** in the **ID** field.
 - Click  to select a student.
5. Enter the information, and click **OK**.

Also, depending on your school's transfer process, one of the following happens to the student's record in your School view, as determined when your Aspen system administrator defined district preferences:

- You can view the student's record as a former student.
- You can no longer view the student in your School view.

If you enter dates that are before an existing enrollment record for the student, Aspen

displays the following error message:



6. Click **OK**, and adjust the dates you entered for the transfer.

Change a Student's Enrollment Status

Some schools might need to manually change a student's enrollment status. For example, you could pre-register a student in May so that his or her information is in the system, even though the student won't attend your school until the fall. Then, in September, you will need to update the student's status to active.

To change a student's enrollment status:

1. Log on to the District or School view.
2. Click the **Student** tab.
3. [Search for and select the student.](#)
4. On the **Options** menu, click **Registration**, then **Change Student Status**. The Update Enrollment Status dialog box appears. Enter the information, and click **OK**. The system creates an **S** enrollment record for the student with the entered date and reason. The system also updates the student's enrollment status.

Promote or Demote a Student

Sometimes a student's year of graduation might change. If he is accelerated to an earlier year of graduation, you promote the student. If she is returned to a later year of graduation, you demote the student.

Note: If you promote a student during the school year, be sure to [view the student's transcript](#) after you promote the student to be sure that grades for the student's current year courses appear for the correct grade levels. If they do not, you can override the grade levels they appear for on the transcript record.

To promote or demote a student:

1. Log on to the District or School view.
2. Click the **Student** tab.
3. [Search for and select the student.](#)
4. On the **Options** menu, click **Registration**, then **Promote/Demote Student**. The Promote/Demote Student dialog box appears.
5. Enter the information, including the student's new year of graduation.

- Click **OK**. The system creates a Yenrollment record and updates the student's YOG and grade level.

Associate a Student to a School

You might want to associate a student to another school in your district. There are two types of associations:







- **Former:** A student is a former student if he or she transfers from your school to another school in your district.
- **Secondary:** A student is a secondary student if he or she attends your school and another school in your district at the same time. For example, a student might attend the high school and the vocational technical school.

Your Aspen administrator determines the data you can edit for former and secondary students.

Note: School associations are only valid for the school year in which you make them.

To view an association or to associate a student with a school:

- Log on to the District, School, Staff, or Health view.
- Click the **Student** tab.
- [Search for and select the student.](#)
- Click the **Membership** side-tab, then click **Schools**. A list of existing school associations for the student appears. If the student is already associated with schools, a list of existing school associations for the student appears.
- Do one of the following:
 - To view the details of an association, select the school, and click **Details** on the **Schools** side-tab.
 - To enter a new school association for the student, on the **Options** menu, click **Add**. The New Student School Association page appears.
- Use the following table to help you complete the fields:

Field	Description
School > Name	Click  and select the school to associate the student with.
School Year	Click  and select the school year for which the association will be in effect.
Association type	<p>Click the drop-down, and select one of the following:</p> <ul style="list-style-type: none"> • Former: A student is a former student if he or she transfers from your school to another school in your district. • Secondary: A student is a secondary student if he or she attends your school and another school in your district at the same time. <div style="border: 1px solid black; background-color: #e6f2ff; padding: 5px; margin-top: 10px;"> <p>Note: If you associate a student with a secondary school here, the Cross-Enrollment alert icon  appears on Student pages throughout Aspen and in the gradebook (if allowed by System Administration preferences and a teacher's gradebook preferences).  indicates that the student is taking classes or receiving services at more than one school.</p> </div>
Attendance management type	<p>Applies to secondary students only.</p> <p>Click the drop-down, and select one of the following:</p> <ul style="list-style-type: none"> • None: The secondary school cannot take daily attendance for this student. • Sole: Only the secondary school can take daily attendance for this student. • Shared: Both primary and secondary schools can take daily attendance for this student. However, the school that enters the attendance owns it, and the other school has read-only access to it. <p>To indicate that the daily attendance was entered at another school, a red asterisk * appears next to it on the Class Office side-tab.</p>
Start date	Click  , and select the date the association begins.
End date	Click  , and select the date the association ends.

7. Click **Save**.

Note: You can filter the Student List to display only secondary or former students.

Create Secondary School Associations

Sometimes, students take classes at your school while taking classes or receiving services at other schools, too. The Create Secondary School Associations wizard is a way to associate these cross-enrolled students with their secondary schools.

Note: If a student's primary school does not use Aspen, he or she must first be enrolled into a ["holding" school](#) before cross-enrolling as a secondary student in an Aspen school.

To associate a student with a secondary school:

1. Log on to the School view.
2. Click the **Student** tab.
3. Click **Options**, then select **Create Secondary School Associations**.

The Create Secondary School Associations wizard appears:

4. Do one of the following:
 - Click **Push** if you are at the student's primary school, and want to push the student records to the secondary school.
 - Click **Pull** if you are at the student's secondary school and want to pull the student records into your school.


Note: Your root organization’s Membership preference determines whether your school pushes or pulls student records to other schools. That selection also determines whether you see a **Push** tab, a **Pull** tab, or both at the top of the wizard.

5. Select the student’s **Secondary school** from the drop-down. If you are pulling a student record into your school, your school’s name appears.
6. Select the **District year** for the cross-enrollment.
7. Enter the **Start date** and **End date** that the student will attend the secondary school.

If you pull a student record into your school, do the following:

8. Enter the **First name**, **Last name**, **Gender**, and **Date of birth** for the student.
9. Click **Search**.
10. A pop-up lists the student’s name, some demographic information, and contact information for the student’s primary school. Click **OK**.

Matching student found. Selecting a student will cross-enroll him or her into your school.

1 record 

Name	Gender	DOB	LASID	Grade	EnrStatus	Last Withdrawal	Contact
<input checked="" type="radio"/> Wright, Samantha	F	4/6/2003	2620002281	04	Active	-	Gary Oaks Secondary SD 73 , Abbotsford School District 34

Note: You cannot “pull” a student who is marked *private* into a secondary school. See [Protecting Student Demographic Information](#).

If you push a student record to another school, do the following:

8. In the **Students** box, select one of the following:
 - **Selection:** Select any student from the Student List.
 - **Snapshots:** Select a snapshot of students.
9. Click **OK**.

Whether you pushed or pulled the student record, a pop-up indicates the results of the cross-enrollment:

Cross-Enrolling Students Whose Primary Schools Do Not Use Aspen

Students whose primary schools do not use Aspen might want to take classes or receive services (cross-enroll) at schools in your district. These students must first be enrolled into a "holding"

school.

After the district creates a holding school, it designates the school as such via its [Membership preferences](#).

To create a "holding" school:

1. Log on to the District view.
2. Click the District tab, **Schools** side-tab.
3. On the **Options** menu, click **Add**. The School Details page appears.
4. Enter any [school details](#) to identify this as the holding school.
5. Click **Save**.

A school registrar can then enroll students into the holding school using the [Student Registration wizard](#) (by selecting the holding school at the **School > Name** field in step 3). The student's enrollment status will be *Active No Primary* once the record is saved.

After the student is enrolled in the holding school, the school registrar can then cross-enroll the student into the secondary school via [Create Secondary School Associations](#).

Secondary School Information Report

Run the Secondary School Information report to view details about cross-enrolled students. You can choose to display:

- students who attend your school as their primary school, and are cross-enrolled at other schools
- students who attend your school as a secondary school
- all cross-enrolled students

Note: This report displays students who were cross-enrolled at any time during the specified date range.

To run the Secondary School Information report:

1. Log on to the School view.
2. Click the **Student** tab.
3. On the **Reports** menu, select **Secondary School Information**. The Secondary School pop-up appears.
4. [Enter the report parameters](#).

The report displays in the format you specify:

Secondary School Information

April 04, 2014

Student Name	Primary School	Cross-Enrolled School(s)	Start Date	End Date
Abreu, Michaela	Belmonte Middle School	Veterans Memorial School	08-Aug-13	04-Aug-14
Abreu, Sammy	Belmonte Middle School	Ballard Early Childhood Center	08-Sep-13	03-Aug-14
Ackroyd, Yasmine	Belmonte Middle School	Gary Oaks Secondary SD 73	07-Aug-13	04-Aug-14
Aiello, Caroline	Belmonte Middle School	Lynnhurst School	10-Nov-13	12-Nov-13
		Itinerant School	12-Nov-13	14-Nov-13
		History School	20-Nov-13	22-Nov-13
		Saugus High School	12-Feb-14	04-Aug-14
Aiello, Kimberly	Belmonte Middle School	Waybright Elementary School	08-Aug-13	04-Aug-14
Aiken, David	Belmonte Middle School	Saugus High School	21-Mar-14	04-Aug-14
Andrews, Connor	Belmonte Middle School	Ballard Early Childhood Center	08-Aug-13	04-Aug-14
		Saugus High School	07-Aug-13	04-Aug-14
		Gary Oaks Secondary SD 73	07-Aug-13	04-Aug-14
Andrews, Randy	Belmonte Middle School	Gary Oaks Secondary SD 73	01-Apr-14	
Andrews, Seth	Belmonte Middle School	Gary Oaks Secondary SD 73	07-Aug-13	15-Mar-14
		Ballard Early Childhood Center	07-Aug-13	31-Mar-14
Arsenault, Morgan	Belmonte Middle School	Ballard Early Childhood Center	07-Aug-13	04-Aug-14
Arsenault, Morgan	Belmonte Middle School	Gary Oaks Secondary SD 73	07-Aug-13	04-Aug-14
		Ballard Early Childhood Center	07-Aug-13	04-Aug-14

Assign a Group of Students to a Program

You can assign a group of students to a program and add it to their student records. For instance, you might want to assign a group of students to the free- or reduced-lunch program, or a college-bound program, to track that data.

You can also [associate one student, or a small number of students, to a program](#).

Note: [Student programs are associated with reference tables](#) defined in the District, Intermediate Organization, School, or Special Education views.





Note: Your district (root organization) determines [who can run this procedure and where it appears](#). The steps below describe one recommended location. See your Aspen administrator for more information.


To assign a group of students to a student program:

1. Log on to the School view.
2. Click the **Student** tab.

3. On the **Options** menu, click **Assign Student Programs**. The Assign Student Programs dialog box appears:

Assign Student Programs

School	Crow Point High School
Program	 
Students to include	Current selection ▼
Search value	<input type="text"/>
Start date	<input type="text"/> 
End date	<input type="text"/> 
Active students only	<input type="checkbox"/>

4. At the **Program** field, click  to select the student program that you want to assign students to.
5. At the **Students to include** field, indicate which group of students you want to associate with the program. Select **Current selection**, **All**, **YOG** (year of graduation), or **Homerroom**.
6. At the **Search value** field, enter the criteria for the previous field. For instance, if you selected **YOG** or **Homerroom**, enter the applicable year of graduation or homeroom number.
7. Enter the date that this association begins at **Start date**.
8. Enter the date that this association ends at **End date**.
9. Select **Active students only** to only include students who have an active enrollment status.
10. Click **Run**.

A message appears indicating the number of students that were associated with the program, and how many student records were skipped:

```

Messages
*****
Students skipped due to existing program within date range:
13 student program record created.
0 student program record skipped.

```

Track a Student's Programs

You can track the programs each student is enrolled in. For example, a student might be enrolled in the ESL and special education programs at your school. For each one, you can track the enrollment start and end dates.

To enter or view a student in a program:

1. Log on to the District or School view.
2. Click the **Student** tab.
3. [Search for and select the student.](#)
4. Click the **Membership** side-tab, then click **Programs**. A list of programs the student is enrolled in appears.
5. Do one of the following:
 - To view the details of the student's enrollment in a program, select the program, and click **Details** on the **Programs** side-tab.
 - To enroll or withdraw a student from a program, on the **Options** menu, click **Add**. The New Student Program Participation page appears. Enter the information, and click **Save**.

View and Manage a Student's Groups

You can track the groups that a particular student belongs to. You can also add a student to a group and delete a student from a group.


Note: Each group might or might not have its own Page.

To manage the groups that a student belongs to:

1. Log on to the School view.
2. Click the **Student** tab.
3. On the Student List, select the checkbox of the student whose groups you want to view.
4. Click the **Membership** side-tab. The Enrollment details appear.
5. On the side-tab, click **Groups**. A list of the student's groups appears:

Group > Title	Group > Category	Type	Management type
<input type="checkbox"/> Class of 2013	Other	Single Person	Manual
<input type="checkbox"/> Crow Point High School	Academic	School	Automatic
<input type="checkbox"/> Chemistry	Academic	Section Roster	Automatic
<input type="checkbox"/> US His 2		Section Roster	Automatic

To add this student to a group:

1. On the **Options** menu, click **Add**.
2. Click  to select a group.
3. Click **Save**.

To remove this student from a group:

1. Select the checkbox of the group you want to remove the student from.
2. On the **Options** menu, click **Delete**.

Entering Student Transactions

You can view details for the following transactions:

- [student fees](#)
- [student events](#)
- [workflows to enter conduct incidents or manage special education plans](#)

View Student Events

You can track any events for a student. For example, you might log each time you send a warning letter home to a student's parents.

To enter an event for a student:

1. Log on to the District, School, or Staff view.
2. Click the **Student** tab.
3. [Search for and select the student](#).
4. Click the **Transactions** side-tab, then **Events**. A list of existing events for the student appears.
5. Do one of the following:
 - To view the details of an event, select the event, and click **Details** on the side-tab.
 - To add an event for the student, on the **Options** menu, click **Add**.

The New Student Event Tracking page appears. Enter the information, and click **Save**.

Manage Student Workflows

Your Aspen system administrator creates workflows to coordinate multi-step processes involving one or more users from start to finish. For example, your system administrator might create conduct workflows, special education workflows, and professional development workflows. For each workflow, a checklist walks users through the process, step-by-step.

After you, or another user, initiates a workflow for a student, use the checklist already created for that workflow to follow the process.

To manage student workflows:

1. Log on to the District or School view.
2. Click the **Student** tab.
3. Search for and select a student. Click the **Transactions** side-tab.
4. Click the **Transactions** side-tab, then **Workflows**. Any current workflows for the student appear.
5. Do one of the following:
 - To complete a task, on the checklist of an existing workflow for the student, select the workflow, and click **Checklist** on the side-tab.
 - To initiate a new workflow, on the **Options** menu, click **Initiate**. The Initiate Workflow wizard appears. Follow the steps of the wizard. After you click **Finish** for Step 3 of the wizard, the system creates the workflow and the checklist becomes available.

Managing Documents for Students

You can manage documents for students from the **Documents** side-tab.

Here you can:

- [View or use journal entries to track meetings with or concerning the individual.](#)
- [View or upload documents to save with the student.](#)
- [View and print other student forms.](#)

Add or View Documents Associated With Students/People


You can attach files such as Microsoft Word and Excel documents to student records. These files are easy to retrieve and view.

Note: Depending on your user role privileges, you may be able to access Documents from the School, District, Staff, Health, Special Education, and Family views.

To attach files:

1. Log on to one of the following:

Managing Student Information

- School view: Click the **Student** tab.
 - District view: Click the **Student** tab.
 - Staff view: Click the **Student** tab.
 - Health view: Click the **Student** tab.
 - Build view: Click the **Student** tab.
 - Special Education view: Click the **Student** tab.
 - Family view: Click the **Family** tab.
2. Click the **Documents** side-tab.
 3. On the **Options** menu, click **Add**. The New Document page appears.
 4. Enter the information in the fields, and import the document.
 5. Click **Save**.
 6. To view the document, click the **Documents** side-tab.
 7. Click the name of the document you want to view.
 8. Click **Download** .

Manage a Student Journal

Create and manage journal entries for students. For example, guidance counselors might create a journal entry each time they meet with a student.

To manage a student journal:

1. Log on to the School or District view.
2. Click the **Student** tab.
3. Select the student.
4. Click the **Documents** side-tab, and then click **Journal**.
5. Do one of the following:
 - To work with an existing journal entry, click the entry.
 - To add a journal entry for a student, on the **Options** menu, click **Add**. The New Student Journal page appears. Enter the information, and click **Save**.

Note: If you select the **Public** checkbox, all users who have access to this student's information can view this journal entry. Otherwise, only the user that enters the journal entry can view it.

View a Student's IEP

You can view a student's special education IEP.

Note: Depending on your user role privileges, you may be able to access Documents from the School, District, Staff, Health, Special Education, and Family views.

To view a student's IEP:

1. Log on to one of the following:
 - School view: Click the **Student** tab.
 - District view: Click the **Student** tab.
 - Staff view: Click the **Student** tab.
 - Health view: Click the **Student** tab.
 - Build view: Click the **Student** tab.
 - Special Education view: Click the **Student** tab.
 - Family view: Click the **Family** tab.
2. Select the student.
3. Click the **Documents** side-tab, then click **IEPs**. A list of the student's IEPs appears.
4. For details of an IEP, click the value in the **IEP status** column.
5. Click the sub-tabs to view all pieces of a student's IEP.

Note: Every time you log on to view a student's IEP, a record is placed in a log that the special education manager monitors.

View and Print Student Forms


The Forms Manager lets you view and print student forms. Depending on your user role privileges, you may be able to create, edit, and track these forms also.

Depending on how the form is defined, the **Forms** side-tab may provide you with the following:


- Copies of student forms you already generated and printed
- A history of when each form was generated and printed
- The ability to print blank copies of a form
- The ability to print multiple forms at one time


To manage forms:

1. Click the **Student** tab.
2. Find and select the student you want to print forms for.
3. Click the **Documents** side-tab.
4. The Forms Manager appears:
 - The first column lists the form ID.
 - The second column lists the full name of the form, along with a link to create a new form.
To create a new copy of a form: Click **New**. If there is not a link to create a new form, then only one copy of the form can be generated.
 - The third column displays checkboxes.
To print multiple forms: Select the checkboxes for the forms you want to print, then click **Print Selected**.

To print one form: Click  next to the date in the last column.

- The last column displays the dates the form was generated.

To view or edit a form: Click a date to view or update the form, or click  to print one copy of the completed form.

Note: If a form can only be generated once, the last column displays  to indicate the form is locked.

Managing a Student's Educational Plans

You can create multiple general educational plans for students, including 504 plans and Educational Proficiency Plans (EPP).

For any type of educational plan, you can review dates, accommodations, disabilities, concerns, and evaluations.

To help you manage a student's educational plan in Aspen, you can do the following:

- [Create a record for the plan.](#)
- [Track meetings held to create and maintain the educational plan.](#)
- [Print an educational plan.](#)
- [End an educational plan.](#)


Create an Educational Plan Record

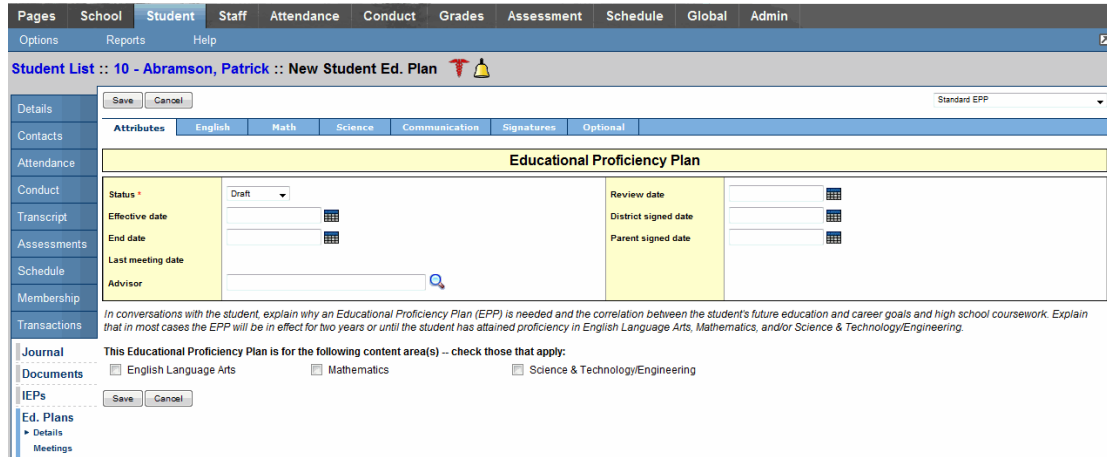
Create a record for a student's educational plan to track review dates, accommodations, disabilities, and all information concerning the plan.

Note: Depending on your user role privileges, you may be able to create a student's educational plan from the **Student** tab, **Ed. Plans** side-tab in the School, District, Staff, Health, and Special Education views. Family portal users may have view access to the plan.



To create an educational plan record:

1. Log on to one of the following:
 - School view
 - District view
 - Staff view
 - Health view
 - Build view
 - Special Education view
2. Click the **Student** tab.
3. Search for and select the student.

4. Click the **Documents** side-tab, and then click **Ed. Plans**.
5. Click , and select **Educational Proficiency Plan**.
6. On the **Options** menu, click **Add**. The template for a standard Educational Proficiency Plan appears:



The screenshot shows a web-based form for creating an Educational Proficiency Plan (EPP) for a student named Patrick Abramson. The form is titled 'Educational Proficiency Plan' and is currently in 'Draft' status. It includes several input fields for dates: Effective date, End date, Review date, District signed date, and Parent signed date. There is also a field for the Advisor's name. Below the form, there are checkboxes to select the content areas for which the EPP is being created: English Language Arts, Mathematics, and Science & Technology/Engineering. The form is part of a larger application interface with various tabs and a sidebar.

7. In the box at the top of the page, enter the general information for the plan:
8. Select a **Status** (*Draft, Active, Previous, Discarded, Rejected*). When you change the status of a draft plan to Active, the system changes the draft to *Previous*.
9. Type or click  to determine the **Effective date, End date, Review date, District signed date, and Parent signed date**.
10. Type or click  to enter an **Advisor**.
11. If you have created a meeting record, [the date of the last meeting record you created for this plan appears](#).
12. Click the following sub-tabs to enter the necessary information:
 - **Attributes**
 - **English**
 - **Math**
 - **Science**
 - **Communication**
 - **Signatures**
 - **Optional**
13. Click **Save**.

Note: To copy an ed. plan for a student, click **Details** on the side-tab. On the **Options** menu, click **Copy**.

Track Meetings for an Educational Plan

Track meetings you hold to initiate, maintain, and adjust an educational plan for a student.

Note: Depending on your user role privileges, you may be able to create a student's educational plan from the **Student** tab, **Ed. Plans** side-tab in the School, District, Staff, Health, and Special Education views. Family portal users may have view access to the plan.

To track meetings:

1. Log on to one of the following:
 - School view
 - District view
 - Staff view
 - Health view
 - Build view
 - Special Education view
2. Click the **Student** tab.
3. Search for and select the student.
4. Click the **Documents** side-tab, and click **Ed. Plans**.
5. Select the plan.
6. On the **Documents** side-tab, click **Meetings** below **Ed. Plans**.
7. On the **Options** menu, click **Add**. The New Student Ed. Plan Meeting page appears.
8. Enter the meeting date, time, location, and details.
9. Click **Save**.

Run the Educational Plan Report

Run the Educational Plan report to print a hard copy of a student's ed. plan. The report groups accommodations by category.

Note: Depending on your user role privileges, you may be able to create a student's educational plan from the **Student** tab, **Ed. Plans** side-tab in the School, District, Staff, Health, and Special Education views. Family portal users may have view access to the plan.

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Educational Proficiency Plan (EPP)

Name: Agurkis, Adam	ID: 1028177893
Date of birth: 6/11/1994	Grade: 11
School: Crow Point High School	YOG: 2012
Parents/Guardian: Richardson, Lee Connly, Lauralee	
Address: 54 Holmes 207 Hingham, MA 02043	Phone: (781) 740-9732

Advisor name: _____ Advisor contact: _____

In conversations with the student, explain why an Educational Proficiency Plan (EPP) is needed and the correlation between the student's future education and career goals and high school coursework. Explain that in most cases the EPP will be in effect for two years or until the student has attained proficiency in English Language Arts and mathematics.

School personnel should indicate the option they will use to document the student's EPP:

A. Department sample EPP template

B. Career Plan Model

C. Locally developed student plan (by _____)

D. Software/web portal

Part I. Student's Courses/Assessments Information

This Educational Proficiency Plan is for the following content area(s) -- check those that

English Language Arts Mathematics Science & Technology / Engineering

Please complete the following review using available criteria.

A. Student high school grades from EPP content area (or all) courses

B. Other diagnostic assessment results

C. Student or faculty input/recommendations if available

Student MCAS Pre-Educational Plan Test

	Assessments				Courses			
	Date	Assessment	Score	Level	Grade	Course	Full Course Name	Final Grade
English								
Math								
Science								

To run the Educational Plan report:

1. Log on to one of the following:
 - School view
 - District view
 - Staff view
 - Health view
 - Special Education view
2. Click the **Student** tab.
3. Search for and select the student.
4. Click the **Documents** side-tab, and then click **Ed. Plans**.
5. Select the plan to go to the Details page.
6. On the **Reports** menu, click **Educational Proficiency Plan**.
7. Select the report format, and click **Run**.

End an Educational Plan

You might need to end an educational plan either during or at the end of the school year.

To end an educational plan:

1. Log on to one of the following:
 - School view
 - District view
 - Staff view
 - Health view
 - Build view
 - Special Education view
1. Click the **Student** tab.
2. Search for and select the student.
3. Click the **Documents** side-tab, and then click **Ed. Plans**.
4. Select the plan.
5. On the **Documents** side-tab, click **Meetings** below **Ed. Plans**.
6. Select the remaining meetings on the plan.
7. On the **Options** menu, click **Delete**.
8. Click **Details** on the side-tab.
9. At the **Status** field, select **Previous**. The educational plan is no longer active.

Managing a Student 504 Plan

Manage a student's 504 plan, including review dates, accommodations, disabilities, concerns, and evaluations.

To manage a student's 504 plan:


- [Create a record for a 504 plan.](#)
- [Track meetings held to create and maintain a 504 plan.](#)
- [Run the 504 Plan report to print a copy of the plan.](#)
- [End a 504 plan.](#)
- [View a summary of a student's 504 plan.](#)
- [Determine the alert icon that appears for a student with a 504 plan.](#)

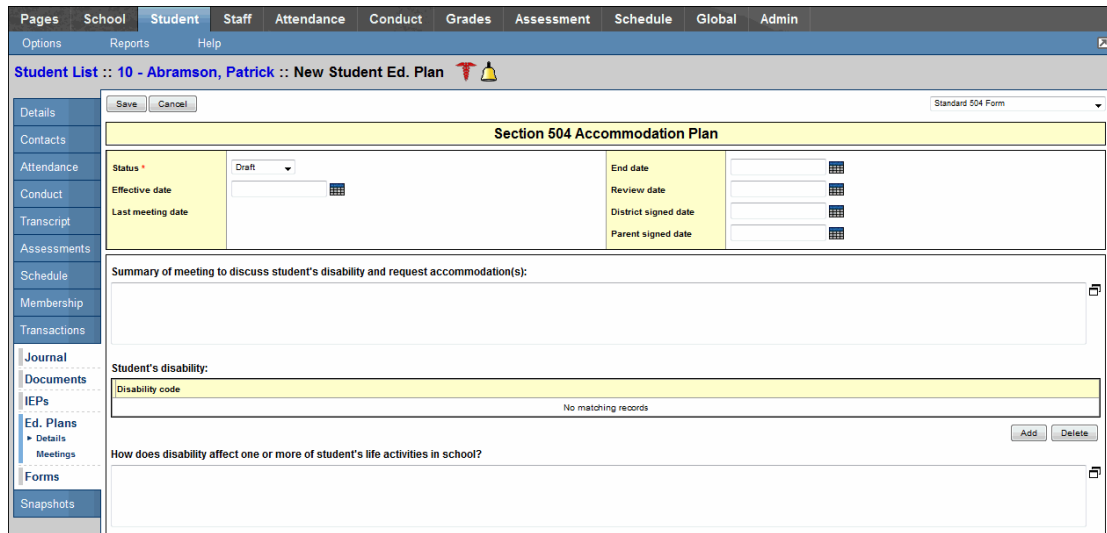
Create a 504 Plan Record

Create a record for a student's 504 plan to track review dates, accommodations, disabilities, and all information concerning the plan.

Note: Depending on your user role privileges, you may be able to create a student's 504 plan from the **Student** tab, **Ed. Plans** side-tab in the School, District, Staff, Health, and Special Education views. Family portal users may have view access to the plan.


To create a 504 plan record:

1. Log on to one of the following:
 - School view
 - District view
 - Staff view
 - Health view
 - Build view
 - Special Education view
2. Click the **Student** tab.
3. Search for and select the student.
4. Click the **Documents** side-tab, and then click **Ed. Plan**.
5. Click , and select **504 Plan**.
6. On the **Options** menu, click **Add**. The Section 504 Accommodation Plan page appears:



7. In the box at the top of the page, enter the general information for the plan:
 - Select a Status (*Draft, Active, Previous, Discarded, Rejected*). When you change the status of a draft plan to *Active*, the system changes the draft to *Previous*.

Note: A **504 alert** icon only appears for a student if the status of the 504 plan is *Active*.

- Type or click  to determine the **Effective date, End date, Review date, District signed date, and Parent signed date**.
 - If you have created a meeting record, [the date of the last meeting record you created for this plan appears](#).
8. Type a summary of the meeting held to discuss the student's disability and accommodations.
 9. Click **Add** to select one or more disabilities you need to list for the student for the 504 plan.

10. Type a description of how the student's disabilities affect the student's life activities in school.
11. Type any parent/guardian and student concerns.
12. To add a record for any evaluations, click **Add**.
13. Type the student's history and evaluative data.
14. To define the accommodations for the student, click **Add**.
15. Type other accommodations not available in the accommodation list.
16. Click **Save**.

Note: To copy a 504 plan for a student, click **Details** on the side-tab. On the **Options** menu, click **Copy**.

Track Meetings for a 504 Plan

Track meetings you hold to initiate, maintain, and adjust a 504 plan for a student.

Note: Depending on your user role privileges, you may be able to create a student's 504 plan from the **Student** tab, **Ed. Plans** side-tab in the School, District, Staff, Health, and Special Education views. Family portal users may have view access to the plan.

To track meetings:

1. Log on to one of the following:
 - School view
 - District view
 - Staff view
 - Health view
 - Build view
 - Special Education view
2. Click the **Student** tab.
3. Search for and select the student.
4. Click the **Documents** side-tab, and then click **Ed. Plans**.
5. Select the plan.
6. On the **Documents** side-tab, click **Meetings** below **Ed. Plans**.
7. On the **Options** menu, click **Add**. The New 504 Plan Meeting page appears.
8. Enter the meeting date, time, location, and details.
9. Click **Save**.

Run the 504 Plan Report

Run the 504 Plan report to print a hard copy of a student's 504 plan. The report groups accommodations by category.

Note: Depending on your user role privileges, you may be able to create a student's 504 plan from the **Student** tab, **Ed. Plans** side-tab in the School, District, Staff, Health, and Special Education views. Family portal users may have view access to the plan.

To run the 504 Plan report:

1. Log on to one of the following:
 - School view
 - District view
 - Staff view
 - Health view
 - Special Education view
2. Click the **Student** tab.
3. Search for and select the student.
4. Click the **Documents** side-tab, and then click **Ed. Plans**.
5. Select the plan to go to the Details page.
6. On the **Reports** menu, click **Educational Proficiency Plan**.
7. Select the report format, and click **Run**.

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Educational Proficiency Plan (EPP)

Name: Clark, Edward	ID: 1177327994
Date of birth: 11/19/1993	Grade: 11
School: Crow Point High School	YOG: 2012
Parents/Guardian Peper, Christine Mcfaline, Leigh	
Address: 928 Beatty Avenue Hingham, MA 02043	Phone: (781) 741-1795

Advisor name: _____ **Advisor contact** _____

In conversations with the student, explain why an Educational Proficiency Plan (EPP) is needed and the correlation between the student's future education and career goals and high school coursework. Explain that in most cases the EPP will be in effect for two years or until the student has attained proficiency in English Language Arts and mathematics.

School personnel should indicate the option they will use to document the student's EPP:

- A. Department sample EPP template
- B. Career Plan Model
- C. Locally developed student plan (by
- D. Software/web portal

Part I. Student's Courses/Assessments Information

This Educational Proficiency Plan is for the following content area(s) -- check those that

- English Language Arts Mathematics Science & Technology / Engineering

Please complete the following review using available criteria.

- A. Student high school grades from EPP content area (or all) courses
- B. Other diagnostic assessment results
- C. Student or faculty input/recommendations if available

Student MCAS Pre-Educational Plan Test

	Assessments				Courses		
	Date	Assessment	Score	Level	Grade Course	Full Course Name	Final Grade
English							
Math							
Science							

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Educational Proficiency Plan (EPP)

Planned Meetings and Communication

Meetings with the student will be scheduled during his/her junior and senior year to evaluate progress made.
Meeting information:

Please note when and how parents/guardians will receive communication from the school about the supports and services this student will receive to reach proficiency.

<i>Letter:</i>	<i>Phone:</i>
<i>In-person</i>	<i>E-</i>
 <i>Letter:</i>	 <i>Phone:</i>
<i>In-person</i>	<i>E-</i>

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Educational Proficiency Plan (EPP)

Part III. Signatures

EPP Completion Verification Section (required):

This student has completed all requirements of his/her Yes No

Principal or headmaster (or designee)

Advisor name: _____ Advisor contact _____

Principal or headmaster (or designee) signature	Date
Student signature	Date
Parent/guardian signature	Date
Guidance or school advisor signature	Date

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Educational Proficiency Plan (EPP)

Optional Section:
Supports & Additional Learning Opportunities

List activities/programs that student is taking part in to complete and support this plan (e.g., tutoring, academic support, AVID® [Advancement Via Individual Determination], study groups, etc.):

Describe any other additional courses or supports that the student will participate in to reach or make progress toward proficiency and college and career readiness:

Identify any school or community member who will meet to encourage the student to be successful and well prepared for his or her high school and post-graduation plans.

Name:

Please record the type of communication (in-person meeting, email, phone, etc.) and the date:

Describe other recommended additional learning opportunities in which the student will participate.


Additional Learning Opportunity	Grade
Advanced Placement (AP)	
Capstone or Senior Project	
Dual Enrollment: courses taken for both high school and college credit	
Online course for high school or college credit	
Service Learning	
Work-based learning	

View Summary of Student's 504 Plan

If a student has an active 504 plan, the **504 Alert** icon  appears next to the student's name.

Note: [Your district can customize the alert icon that appears for 504 plans.](#)

To view a summary of the student's 504 plan:

1. Click the **504 Alert** icon . The alert lists the effective date, and for each accommodation, the content area, category, name, and description:

Effective date	8/29/2008		
Accommodations			
ContentArea	Category	Name	Description
All	Scheduling/Timing	Frequent Breaks	Test administered in short periods with frequent b...
All	Scheduling/Timing	Time of Day	Test administered at a time of day that takes into...
<input type="button" value="Cancel"/>			

2. Click the **Description** to view details.

End a 504 Plan

You might need to end a 504 plan either during or at the end of the school year.

Note: Depending on your user role privileges, you may be able to create a student's 504 plan from the **Student** tab, **Ed. Plans** side-tab in the School, District, Staff, Health, and Special Education views. Family portal users may have view access to the plan.

To end a 504 plan:

1. Log on to one of the following:
 - School view
 - District view
 - Staff view
 - Health view
 - Build view
 - Special Education view
2. Click the **Student** tab.
3. Search for and select the student.
4. Click the **Documents**, and then click **Ed. Plans**.
5. Select the plan.
6. On the **Documents** side-tab, click **Meetings** below **Ed. Plans**.
7. Select the remaining meetings on the plan.
8. On the **Options** menu, click **Delete**.
9. Click **Details** on the side-tab.
10. At the **Status** field, select **Previous**. The 504 plan is no longer active.

Determine the Alert Icon for a 504 Plan

You can determine the icon that appears for students with a 504 plan.

To determine the alert icon for 504 plans:

1. Log on to the District view.
2. Click the **Admin** tab.
3. Click the **Data Dictionary** side-tab.
4. On the **Data Dictionary** side-tab, click **Extensions**.
5. Find and select the **STD-504-PLAN** extension.
6. Select the **General Ed Plan** checkbox.
7. Click the **Icon** drop-down to select the icon. As you scroll through the list, the icon appears next to the field:

The screenshot shows the 'Extensions :: STD-504-PLAN - 504 Plan' configuration page. The page has a top navigation bar with tabs: Pages, District, Student, Staff, Attendance, Conduct, Grades, Assessment, Schedule, Global, Tools, and Admin. Below the navigation bar are 'Options', 'Reports', and 'Help' links. The main content area is titled 'Extensions :: STD-504-PLAN - 504 Plan' and includes a 'Save' button, a 'Cancel' button, and an 'Auto-saved at 9:27 PM' indicator. The page is divided into several sections: Users, Security, Tables, Extensions (with a 'Details' sub-section), Reference, Calculated Fields, Forms, Workflows, Widget Definitions, System Status, and Logs. The 'Extensions' section is currently active, showing the configuration for the 'STD-504-PLAN' extension. The fields are: ID (STD-504-PLAN), Name (504 Plan), Description (Dictionary for the Standard 504 Plan), Category (Student), Parent dictionary > Name (empty), Health? (checkbox), Special Ed? (checkbox), PD? (checkbox), General Ed Plan? (checkbox checked), and Icon (dropdown menu). The dropdown menu is open, showing a list of icons: 504 Education Plan, Curriculum Accommodation Plan (highlighted), Education Proficiency Plan, Gifted and Talented, Individualized Education Plan, Individualized Student Success Plan, and Response to Intervention. A 'CAP' icon is visible next to the dropdown menu.

8. Click **Save**. The icon appears as an alert icon for students with active 504 plans.

Manage Snapshots for Individual Records

You can manage the snapshots a specific student, staff member, room, or course is a member of. For example, assume you create a snapshot of all students on the Volleyball team at the beginning of the season. Then, a student joins the team. Select that student and add him or her to the snapshot.

To manage snapshot membership for an individual record:

- To manage student snapshots, click the **Student** tab.
- To manage staff snapshots, click the **Staff** tab.


2. Search for and select the specific record.
3. Click the **Snapshots** side-tab. A list of snapshots the student, staff member, course, or room belongs to appears.
4. Do one of the following:
 - To add the record to a snapshot, on the **Options** menu, click **Add**. The Snapshot Pick List appears. Select the snapshot and click **OK**.
 - To delete a record from a snapshot, select the checkbox next to the record. On the **Options** menu, click **Delete**.

Associate Related Students

Indicate when students are related, or share an address. When students at a school share an address, you can [assign one student as the courier](#) to bring handouts home. You can also [change the courier](#), as needed.

To associate related students:

1. Log on to the District, Intermediate Organization or School view.
2. Click the **Student** tab.
3. [Search for and select the student](#).
4. Click the **Contacts** side-tab, then click **Related Students**.
5. On the **Options** menu, click **Add**. The New Student page appears:

6. At the **Name** field, click  and select the associated student from the pop-up. Click **OK**.
7. At the **Relationship** field, click the drop-down to indicate whether this student **Lives with** the other student, or is a **Relative** or **Sibling**.
8. Click **Save**.

Assign a Student Courier

Aspen lets you assign a courier to help distribute notices to students' homes and cut down on ink/paper costs.

At the beginning of each school year, you can run this procedure to ensure that each household has a courier. Aspen automatically assigns the older student at an address as the courier.

You can [change the default courier](#), if needed. If only one student at an address attends this school, that student is automatically assigned as the courier.

Note: Your district (root organization) determines who can run this procedure and where it appears. The following steps describe one recommended location. See your Aspen system administrator for more information.

To assign or edit student couriers:

1. Log on to the School view.
2. Click the **Student** tab.
3. On the **Options** menu, select **Assign Couriers**. The Student List appears, with students grouped by address.
4. Search for the student or family you are looking for. To select a different student in the family as the courier, deselect the checkbox next to that student's name in the **Courier** column. Select the checkbox in the row of the student who will act as the courier.
5. Click **Save**.

Note: For student courier information to appear on Aspen reports, see your Aspen system administrator.

Manage Courier Groups

When students who attend the same school share an address, Aspen [can assign one student as the courier](#) to bring handouts home. Aspen automatically assigns the older student at an address as the courier, but you can change the default courier as needed.

To change the student courier at a shared address:

1. Log on to the School view.
2. Click the **Student** tab.
3. Select the checkbox next to the student assigned as the courier, then click **Details**.
4. In the Courier Group box at the bottom of the details page, click the **Manage Courier Group** link.

The Student Pick List pop-up appears for the students at this address:

- The Shared Address box lists the students' address.
- The Shared School box lists the school they attend.
- The Update Courier box lists the students' names at this address.

5. In the Update Courier box, select the checkbox next to the name of the student who will serve as the courier for this address.
6. Click **Save**.
7. When you return to the student details page, click **Save**.

Note: For student courier information to appear on Aspen reports, see your Aspen system administrator.

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