Instructional Management Program
and Academic Communication Tool

SIM Elementary School Scheduling
User Guide 2017

03/15/2017
Version 12.0 FINAL
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*** Note***
This module was updated in IMPACT Student Information Management (SIM) version 8.4.3. There may be slight differences between screens in this user guide compared to the screens in the actual CPS IMPACT SIM Production environment. All screens were captured in Windows using Internet Explorer; Macintosh views may differ.
Introduction

Description
This user guide is designed to assist Elementary School Schedulers in using the SIM elementary scheduling functionality. It explains the elementary scheduling process and how to maintain student schedules once the next school year has started.

Objectives
- Setup and verify scheduling activities for your school (as detailed in the Checklist on page 5)
- Explain the Next Year Scheduling process (as detailed on page 7)
- Define scheduling terminology (as detailed in Appendix A)

Online Help and Support
- ES Schedulers Group: https://groups.google.com/a/cps.edu/forum/#forum/elementary_schoolSchedulers
- Course Code Approval Mailbox (to request a new or access to an existing course)
  - Email address: coursecodeapproval@cps.edu
- Office of Teaching and Learning
  - Phillip Jackson, Manager of Student Scheduling
  - Matt Olson, Project Manager for the Office of Core Supports
- IMPACT SIM Help Menu (Vendor On-line Documentation)
  - Contents Help -- online search for specific information using the table of contents or index, or by text search
  - See Appendix A of this user guide for key ES Scheduling Terminology.
- IMPACT Website: http://impact.cps.k12.il.us
  - Introduction to SIM (basic system navigation)
  - Maintaining PE, PK, and K Homeroom Information in SIM
    http://impact.cps.k12.il.us/downloads/MaintainingPE_PK_K_Homeroom_Info.pdf
  - Managing Teacher Class Assignments
    http://impact.cps.k12.il.us/downloads/ManagingTeacherClassAssignments.pdf
  - ES Scheduling for SIM Summer
- ITS Support Desk: 3-EXCL (773-553-3925), option 2
Checklist: ES Scheduling for School Year 2017-18

This checklist reminds you of “next year scheduling tasks” that need to be completed in the Planning Calendar in preparation for School Year 2017-18 BEFORE the District runs Year End Processing (YEP) at the end of June 2017. After YEP, these tasks can only be completed in the Active Calendar for new School Year 2017-18.

<table>
<thead>
<tr>
<th>Reminder Checklist</th>
<th>Reference Page #</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1. Add new rooms to your school, if needed</strong></td>
<td>9</td>
</tr>
<tr>
<td><strong>2. Schedule subject framework</strong></td>
<td>10 - 12</td>
</tr>
<tr>
<td>• If your school does not offer a subject, do NOT schedule it at your school.</td>
<td></td>
</tr>
<tr>
<td>• For subjects scheduled, select ALL grade levels 1 – 8 for those subjects.</td>
<td></td>
</tr>
<tr>
<td>• If your school offers a subject only taught to specific students, such as Algebra, change the default settings on the Edit Subject page for all grade levels to state that you will (manually) assign this subject to individual students.</td>
<td></td>
</tr>
<tr>
<td><strong>3. Update (add/delete, etc.) your school’s homerooms, if needed.</strong></td>
<td>13 - 14</td>
</tr>
<tr>
<td>• * Verify correct teachers are assigned to their correct homerooms.</td>
<td></td>
</tr>
<tr>
<td>• For PE, PK, K homerooms, it is important to complete the Additional Information as it could impact your school’s funding for Early Childhood programs. See the document Maintaining PE, PK, and K Homeroom Information in SIM.</td>
<td></td>
</tr>
<tr>
<td><strong>4. * Assign Ancillary teachers to their subjects (i.e. Art, Music, Library, etc.)</strong></td>
<td>15</td>
</tr>
<tr>
<td><strong>5. * If your school does departmentalizing, assign teachers to their classes.</strong></td>
<td>16</td>
</tr>
<tr>
<td><strong>6. * Assign Special Education Teachers to “Class Rosters”</strong></td>
<td>17</td>
</tr>
<tr>
<td>• Use this option if Special Education teachers want to have their own class rosters in the IMPACT Gradebook so that they can create assignments and enter grades.</td>
<td></td>
</tr>
<tr>
<td><strong>7. Assign students to their homerooms.</strong></td>
<td>18</td>
</tr>
<tr>
<td><strong>8. Create Student Schedule Process (Step 5 on Scheduling page)</strong></td>
<td>19</td>
</tr>
<tr>
<td>• This process must be completed in order to create students’ schedules.</td>
<td></td>
</tr>
<tr>
<td><strong>9. Manually Assign Students to Classes</strong></td>
<td>20 - 21</td>
</tr>
<tr>
<td>• If offering a subject only taught to specific students (such as Algebra, Foreign Languages, etc.), manually assign students to these classes.</td>
<td></td>
</tr>
<tr>
<td><strong>Reminders When Assigning Teachers:</strong></td>
<td></td>
</tr>
<tr>
<td>• For teachers who will be new to your school, if the new teacher’s name is not yet available in SIM, leave the teacher field BLANK until that teacher’s name is available. Do NOT add another name as a placeholder.</td>
<td></td>
</tr>
<tr>
<td>• IMPORTANT: NCLB requirements state that staff assigned to instruct a class must hold valid certifications and endorsements. Staff credentials can be verified in SIM, as detailed on page 8.</td>
<td></td>
</tr>
<tr>
<td>• Schools must assign a Teacher of Record. See the document Managing Teacher Class Assignments.</td>
<td></td>
</tr>
</tbody>
</table>
Elementary Scheduling Overview

In elementary school scheduling, all students are assigned to homerooms. Based on their homeroom assignments, students are automatically assigned to core classes. You can then adjust individual student schedules by assigning specialty classes, subject exceptions, or resource services. You can also transfer students to other classes.

If desired, you can create a schedule structure and assign meeting patterns to classes. Using a schedule structure allows you to track instructional minutes for classes, but it is not required for elementary school scheduling.

Scheduling in Active and Planning Calendars

The timing of the school year determines which calendar you use to perform scheduling activities. In SIM, there are three calendars:

1. The **Active Calendar** is the default calendar. This is the calendar used for the current school year and related reporting periods.
2. The **Planning Calendar** is created to plan for the upcoming school year, referred to as Next Year Preparation (NYP).
   - When you schedule your school in the Planning Calendar, you should follow distinct steps as detailed on the ES Scheduling Checklist on page 5.
3. At the end of the current school year, Year End Processing (YEP) is run. It is during this process that the planning calendar is made active, and the active calendar becomes the historical calendar. The **Historical Calendar** cannot be viewed in SIM, however, information can be extracted for reporting purposes.
Next Year Scheduling Process (District- and School-level)

There are a number of steps involved in the Next Year Scheduling process, at both the district and school-level. At the District-level, the District Planning Calendar is created; the School Planning Calendars are created; and the Subject Framework is published at all schools. At the school-level, next year tasks are performed in the Planning Calendar on the Scheduling page in SIM, as detailed below.

View the Scheduling Page in the Planning Calendar

The followings steps detail how to view the Scheduling page in the Planning Calendar:

1. From the Breadcrumbs bar, to the far right, click the Planning button to switch to the Planning Calendar, which will appear in green.
2. On the horizontal Menu bar, under Admin, click Scheduling. Note the following:

   Step 1: Make sure staff, rooms, and subjects are set up correctly for your school.

   Step 2: This step is OPTIONAL and only necessary if your school decides to use bell schedules. See “Note” box below.

   Step 3: Set up homerooms and build homeroom rosters, verify how subjects are scheduled.

   Step 4: Adjust class schedules by changing assigned teachers, assigning additional teachers, assigning rooms, and assigning meeting patterns to classes, if applicable.

   Step 5: Create student schedules by assigning students to homerooms and classes.

   *Step 2. Set up the schedule structure is OPTIONAL and only necessary if your school decides to use bell schedules. Please contact Phillip Jackson, Manager of Student Scheduling, if you plan to use Step 2.*
Setup Basic Scheduling Elements

Once the Planning Calendar has been released, you can then set up and/or validate the basic scheduling elements: staff list, room setup, and the subject framework.

View Staff List and Verify Staff Credentials

User accounts and staff records are created at the district level and validated at the school level. Ensure your school staff exist in SIM and are set up correctly so that you can assign teachers in your school to a specific homeroom and classes.

NCLB requirements state that staff assigned to instruct a class must hold valid certifications and endorsements. This information is available in SIM and is updated with information from the Talent Office. It is read-only in SIM for school schedulers and administrators. This information should be verified, if needed, before assigning a teacher to a class.

The following steps detail how to view the staff list for your school and verify staff credentials:

1. On the horizontal Menu bar, under Admin, click Scheduling.
2. On the Scheduling page, under Step 1, click Staff List.
3. Click Display All Records. This page allows you to view all staff in your school. Note: You can also search for a specific staff member by using the Staff Search feature.
4. To view staff credentials for a particular teacher, click on that “Teacher’s Name” hyperlink. The Edit Staff Demographics page displays.
5. Click the Professional Info tab to view Degree Information and Certificate Information.
6. From the Breadcrumbs bar, click Scheduling to return to the Scheduling page.
Add a Room

Rooms in a building must be designated as able to be scheduled in order for them to be available during the scheduling of subjects and classes.

You can also specify the number of separate classes that can be taught in a room at one time (known as concurrent classes); for example, badminton and volleyball might be taught in the gym at the same time; therefore, scheduling information for the gym would specify two concurrent classes are allowed.

The following steps details how to add a room from the Planning Calendar:

1. On the Scheduling page, under Step 1, click Room Setup.
2. On the Buildings page, under the # Rooms column, click the “#” link.
3. On the Rooms page, from the Actions menu, click Add Room.
4. Complete the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Enter/Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>Room no.</td>
<td>for example: 199</td>
</tr>
<tr>
<td>Room name</td>
<td>for example: 199</td>
</tr>
<tr>
<td>Room type</td>
<td>for example: Academic Classroom</td>
</tr>
<tr>
<td>Optimal capacity</td>
<td>for example: 28</td>
</tr>
<tr>
<td>Maximum capacity</td>
<td>for example: 28</td>
</tr>
<tr>
<td>Can be scheduled</td>
<td>Defaults as selected. Do not change.</td>
</tr>
<tr>
<td>Allow</td>
<td>Check this box</td>
</tr>
<tr>
<td>Concurrent classes</td>
<td>Leave this field as is (Unchecked)</td>
</tr>
<tr>
<td>Wheelchair Accessible</td>
<td>Defaults as selected. Do not change.</td>
</tr>
<tr>
<td>Communication No.</td>
<td>for example: 555-1212</td>
</tr>
<tr>
<td>Communication</td>
<td>select Work phone number</td>
</tr>
</tbody>
</table>

5. Click OK.
6. Click School Setup in the Breadcrumbs bar to return to the School Setup page.

Adding or deleting a room in the Planning Calendar will also be reflected in the Active Calendar. This also applies when adding or deleting a room in the Active Calendar; it will be reflected in the Planning Calendar.
Verify Subject Framework and Schedule Subjects

Once the district publishes the subject framework, each school validates it to determine the subjects that will be offered in the next school year, and to which grade levels.

If you have questions or concerns about the subjects available at your school, submit your inquiry to the Course Code Approval mailbox (email address: coursecodeapproval@cps.edu).

After the staff, rooms, subject framework, and schedule structure are set up, subjects can be scheduled. When you schedule subjects, you specify how subjects are assigned to students and how classes are created for the subjects.

Verify Subject Framework for Your School

The following steps detail how to verify your school’s Subject Framework:

1. On the Scheduling page, under Step 1, click Subject Framework.
2. Click the checkbox to the left of the first subject (for example, CHGO READING FRMWK).
3. From the Actions menu, select Schedule/Un-schedule Generic Subject.
4. In the Schedule/Un-schedule Generic Subject dialog, check every grade level.
5. Click OK.
6. Repeat steps 2 – 5, only for the subjects that will be offered at your school for the next school year.

The default setting for each subject automatically assigns all students in the grade levels to classes taught by the homeroom teacher, which can be changed, as needed, once the subject is scheduled.

IMPORTANT: If your school does not offer a subject, do NOT schedule it at your school.
Schedule Core and Specialty Subjects (Algebra, Foreign Languages, etc.)

The following steps detail how to manually schedule a subject for your school. In this example, Algebra is only being offered to your 8th grade students.

1. In the Subject Framework, click the Y where Algebra and 8 intersect. The Edit Subject page displays.

2. Complete the Edit Subject page as illustrated in the screen capture below and click OK.

3. Repeat steps 1 and 2 for all grade levels for the subject in question.

Although Algebra will only be taught to 8th grade students, you will need to schedule it on the Edit Subject page for all grade levels, as shown in the screen capture below. To manually assign students to this Algebra class, see the section Manually Assign Students to Classes on page 20.

**IMPORTANT:** Although a particular subject will be taught to only a specific group of students, you must schedule it for each grade level.
Confirm All Subjects Scheduled for Your School

You can use the Subject Scheduling page to confirm that you have scheduled all of the subjects in your school, as follows:

1. On the Scheduling page, under Step 3, click Subject Scheduling. Note the following:

   ![Subject Scheduling Table]

   Under the Auto Assign column, a Y appears, indicating automatic assignment to students based on grade level as the default. However, once a subject is manually assigned to students, the Y disappears from the column.

   Under the # Classes column, if a subject has not been automatically or manually scheduled, a zero (0) will be listed. If the subject needs to be scheduled, you can do it here by clicking the subject name to display the Edit Subject page.

2. In the Breadcrumbs bar, click Scheduling.
Add/Edit Homerooms and Assign Teachers

Add Homerooms

You may need to edit homeroom information or add a new homeroom (for instance, your school adds a portable classroom).

When including a portable classroom in your scheduling setup, you should create a room first (via the Room Setup page) so that the homeroom is available for scheduling in cases where there is the potential that you might use it for other classes or assign the homeroom a meeting pattern.

When editing an existing homeroom or adding a new homeroom in the Planning Calendar, this change does NOT impact what is currently in your Active Calendar.

The following steps detail how to add a homeroom:

1. On the School Setup page, under School, click Homerooms.
2. From the Actions menu, click Add Homeroom.
3. Complete the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Enter/Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>Homeroom name</td>
<td>for example: A199 (IMPORTANT: See the document Maintaining PE and PK Homeroom Information in SIM for the naming convention that must be used for PE and PK homerooms.)</td>
</tr>
<tr>
<td>Room</td>
<td>for example: 199</td>
</tr>
<tr>
<td>Capacity</td>
<td>for example: 28</td>
</tr>
<tr>
<td>Teacher</td>
<td>Select the Homeroom teacher (IMPORTANT: Only select the homeroom teacher who will be taking attendance. If more than one teacher is added in SIM, the teacher listed first will be imported into the Gradebook.)</td>
</tr>
<tr>
<td>Grade</td>
<td>K</td>
</tr>
<tr>
<td>Attendance</td>
<td>Defaults to “Full Day”. Leave as is.</td>
</tr>
<tr>
<td>Scheduling group</td>
<td>Defaults to “Homerooms”. Leave as is.</td>
</tr>
<tr>
<td>Meeting pattern</td>
<td>Defaults to “None”. Leave as is.</td>
</tr>
<tr>
<td>Default attendance code</td>
<td>Defaults to “Present”. Leave as is.</td>
</tr>
</tbody>
</table>
4. For "PE and PK homerooms, scroll down to the Additional Information panel and complete the appropriate information. See Notes box below for more information.

5. Click Ok.

6. From the Breadcrumbs bar, click School Setup to return to the School Setup page.
Assign Teachers to Homerooms and Classes

Teachers can be assigned to teach both classes and homerooms in elementary school setup and scheduling. Teacher assignments can be made for ancillary teachers, homeroom teachers, and departmental teachers. The following section provides “how to” steps on the different types of teacher assignments.

NCLB requirements state that staff assigned to instruct a class must hold valid certifications and endorsements. This information is now available in SIM and is updated with information from the Talent Office. It is read-only in SIM for schedulers and administrators. This information should be verified, if needed, before assigning a teacher to a class.

For teachers who will be new to your school: When scheduling classes, if the new teacher’s name is not yet available in SIM, leave the teacher field BLANK until that teacher’s name is available. Do NOT add another name as a placeholder.

The following steps detail how to assign a teacher to a homeroom:

1. In the horizontal Menu bar, under Admin, click Scheduling.
2. On the Scheduling page, under Step 3, click Homerooms.
3. Click the hyperlink for the desired Homeroom.
4. In the Teacher dropdown, click the <teacher name>.
5. Click OK.
6. From the Breadcrumbs bar, click Scheduling to return to the Scheduling page.

The following steps detail how to assign an ancillary teacher to teach Art:

1. On the Scheduling page, under Step 3, click Subject Scheduling. Note: Subjects are listed alphabetically on the Subject Scheduling page.
2. Click Art Standards 1.
3. On the Edit Subject page, in the Schedule panel, verify the Can schedule checkbox is selected.
4. To the right of Default teacher, select Specify, and from the dropdown, select the <teacher name>.
5. Click OK.
6. From the Subject Scheduling page, repeat steps 1-5 above for the remaining grade levels.
7. From the Breadcrumbs bar, click Scheduling to return to the Scheduling page.
In this example, Grades 7 and 8 are departmentalized. The following steps detail how to assign a teacher to all 7th and 8th grade Mathematics classes:

1. On the Scheduling page, under Step 3, click Subject Scheduling.
2. Using the paging controls, scroll to the page which lists the Mathematics subjects.
3. Click Mathematics Standards 7.
4. On the Edit Subject page, in the Schedule panel, verify the Can schedule checkbox is selected.
5. To the right of Default teacher, select Specify, and from the dropdown, select the <teacher name>.
6. Click OK.
7. From the Subject Scheduling page, repeat steps 1-6 above for Mathematics Standards 8.
8. From the Breadcrumbs bar, click Scheduling to return to the Scheduling page.

In this example, Grade 6 is departmentalized. The following steps detail how to assign a different teacher to at least one of the 6th grade Mathematics classes:

1. On the Scheduling page, under Step 3, click Subject Scheduling.
2. Using the paging controls, scroll to the page which lists the Mathematics subjects.
3. In the # Classes column for Mathematics Standards 6, click the # hyperlink.
4. On the Class Setup page, select the checkbox for the class which will be taught by a different teacher.
5. Scroll down to the Class Schedule panel and for the Teacher field, select from the dropdown list the <teacher name>.
6. Click Save.
7. Repeat steps 4 – 6 if other Mathematics Standards 6 classes have a different teacher.
8. From the Breadcrumbs bar, click Scheduling to return to the Scheduling page.
Assign Special Education Teachers to Individual Class Rosters

Scenario: In your school, Special Education teachers work with the General Education teachers within inclusion settings. Special Education teachers want to be able to have their own rosters, in the Gradebook, of the students receiving specialized services so that they can create assignments and give grades for those students.

Rather than having to share class rosters with the General Education teacher, you will create individual “class rosters” for the Special Education teachers and schedule students into them in SIM. This information will then be imported into the Gradebook.

This process is done by first creating a “Non-Attendance” Homeroom, as detailed below.

1. **To create a “Non-Attendance” Homeroom:**
   a. Follow the steps to add a homeroom, as detailed on page 13.
   b. **IMPORTANT:** Only complete the following fields: **Homeroom name** (enter 200) and **Grade** (select all grade levels). Do not add an “A” or “B” in front of the HR name.
   c. Do not select a teacher for this Homeroom because you will NOT be taking attendance.

2. **To assign the Special Education teacher:**
   a. On the Scheduling page, under **Step 3**, click **Subject Scheduling**.
   b. Using the paging controls, scroll to the page which lists the subject for that particular teacher (for example, **Chgo Reading Framework 3**).
   c. In the **# Classes** column for the subject, click the **#** hyperlink.
   d. On the **Class Setup** page, select the checkbox for the “Non Attendance” class whose teacher name you want to add.
   e. Scroll down to the **Class Schedule** panel and for the **Teacher** field, select from the dropdown list the Special Education <teacher name>.
   f. Click **Save**.
   g. From the **Breadcrumbs bar**, click **Scheduling** to return to the **Scheduling** page.

3. **To assign students:**
   The steps to manually assign students are detailed on pages 20 and 21, sections entitled **Transfer Students Between Classes** and **Assign Students to Classes**.
Assign/Transfer Homerooms for Students

Assign Homerooms

The following steps detail how to assign students to homerooms:

1. On the Home Page, perform a quick search for the applicable students (for example, 6th grade students).
2. On the Student Search Results page, select the students to be assigned to the homerooms in question.
3. From the Actions menu, click Assign > Values.
4. On the Assign Values dialog, in the Assign Field dropdown, click Homeroom.
5. In the New Value dropdown, select the applicable 6th grade homeroom.
6. Click Add to List.
7. Click OK.
8. In the warning dialog, click OK.
9. In the confirmation dialog, click OK.
10. Repeat steps 1 – 9 to assign the remaining students to your applicable homerooms.
11. From the Breadcrumbs bar, click Home.

Transfer Homerooms

The following steps detail how to transfer students between homerooms:

1. On the Home page, perform a quick search for the applicable students (for example, 6th grade students).
2. On the Student Search Results page, click the HR column to sort homerooms in ascending order.
3. Select the students to be transferred from one homeroom to another homeroom.
4. From the Actions menu, click Transfer Homeroom.
5. On the Transfer Homeroom page, in the HR column, select the homeroom the students are being transferred to.
6. Click OK.
7. From the Breadcrumbs bar, click Home.
Create Student Schedule Process

The Create Student Schedule process is completed AFTER subjects are scheduled for your school and homeroom assignments have been made. It must be done in order to ensure that classes are populated with students for subjects that are not manually scheduled. Once the student schedules are created, this information will be imported into the Gradebook.

Note: If only an individual student’s schedule needs to be created (for example, a new student), use the Assign Default Classes button located on the student’s Schedule page (inside the student’s record).

This process can be done in the Planning and Active Calendars.

1. On the Home page, on the horizontal Menu bar, under Admin, click Scheduling.
2. On the Scheduling page, under Step 5, click Create Student Schedules.
3. In the Webpage Dialog box, click the All Students radio button.
4. Click OK.
5. From the Breadcrumbs bar, click Home.
Manually Assign Students to Classes

The following section details how to make manual adjustments to students’ schedules, as well as view a student’s schedule.

Transfer Students Between Classes

The following steps detail how to transfer students between classes:

1. On the Scheduling page, under Step 4, click Class Setup.
2. On the Class Setup page, on the By Subject tab, search for the classes in question (for example: Class name contains CHGO (for Chicago Reading Framework).
3. Click Search.
4. In the Subject Search Results, select the checkbox for the two classes in question;
5. From the Actions menu, click Transfer Students between Classes.
6. On the Transfer Students Between Classes page, select a class and then select students to transfer to that class.
7. Click Transfer to Selected Classes.
8. From the Breadcrumbs bar, click Scheduling to return to the Scheduling page.

Assign Students to Classes

The following steps detail how to manually assign students to a class (for example, an Algebra class):

1. On the Home page, perform a quick search for 8th grade students.
2. On the Student Search Results page, select the students in question.
3. From the Actions menu, click Assign > Classes.
4. On the Assign Classes page, in the Class Search Results panel, click Display All Records.
5. Select ALGEBRA 8.
6. Click Add Class to add the class to the students’ schedules.
The class name appears in the Add Class list (under the Class to add/drop for selected students panel). To remove a class from this list, click Remove from list.

7. Click OK to add the class to the students’ schedules and return to the Student Search page.
8. From the Breadcrumbs bar, click Home.

**Drop Students from Classes**

The following steps detail how to drop students from a class (for example, an 8th grade Math class):

1. On the Home page, perform a quick search for grade 8 students.
2. On the Student Search Results page, select the students in question.
3. From the Actions menu, click Assign > Classes.
4. On the Assign Classes page, in the Class Search Results panel, click Display All Records.
5. Select Mathematics 8.
6. Click Drop Class to remove the class from the students’ schedules.

**View Student Schedule**

Student schedules list classes to which students have been assigned, and if applicable, meeting patterns. Individual student schedules are accessible from the Student Demographics page.

The following steps detail how to view student’s individual schedules:

1. On the Home page, perform a quick search to locate and open a student’s record.
2. On the Student Demographics page, in the Control bar, click Schedule.
3. From the Breadcrumbs bar, click Home.

Note that it is possible to perform the following functions directly from the Student Schedule page: add or drop the student in a class; transfer the student between classes; and transfer the student to a new homeroom.
Year End Processing (YEP)

YEP Overview

At the end of the current school year (in June), Year End Processing (YEP) is run. It is during this process that the planning calendar is made active, and the active calendar becomes the historical calendar.

Prior to YEP, schools should complete the following two activities:

1. **Verify Student Projections** - Prior to the end of each academic school year, students currently enrolled at an elementary school are projected to the school that they are expected to attend during the upcoming academic school year. For more information, refer to the [Student Projections Quick Guide](#).

2. **Verify Student Promotion Status** - When YEP is run, all students whose promotion status is set to “Pending” is advanced one grade level. The promotion status field is located on the student's Demographics page in SIM. Prior to YEP, schools need to verify that all students' promotion status is set correctly. For more information, refer to the [YEP Quick Guide: Closing the School Year Successfully for Elementary Schools](#).

   > Student’s Promotion Status automatically defaults to “Pending” in SIM. When YEP is run, this “Pending” equates to “Promoted” and students are advanced one grade level.

After YEP is complete, you are now ready to view the schedules of students in your school and maintain them throughout this new school year. In addition to the tasks you performed in your planning calendar, there are other tasks available only in the active calendar, such as:

- adding and applying resource services (see page 24 for details)
- adding subject exceptions (see page 25 for details)
Maintain Student Schedules in the Active Calendar

View the Scheduling Page in the Active Calendar

The followings steps detail how to view the Scheduling page in the Active Calendar:

1. On the horizontal Menu bar, under Admin, click Scheduling.

Note: Step 6, Set up resource services is only available in the Active Calendar.
Add Resource Service

Resource services are optional services typically taught by a resource teacher and are associated with a particular subject. In SIM, classes for resource services are not created, however you can specify when each student receives a service, and whether it's in the classroom or a pullout format. Students receiving services are added to a resource roster.

Before adding a resource service to a student, that particular resource must be setup from the Scheduling page.

To setup a resource service:

1. On the horizontal Menu bar, under Admin, click Scheduling.
3. From the Actions menu, click Add Resource Service.
4. Complete the following fields and click OK:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Enter/Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource service name</td>
<td>for example: Remedial Reading</td>
</tr>
<tr>
<td>Short name</td>
<td>for example: RR</td>
</tr>
<tr>
<td>Service number</td>
<td>for example: RR001</td>
</tr>
<tr>
<td>Related subject</td>
<td>Select the related subject from the drop down menu</td>
</tr>
<tr>
<td>Default Teacher</td>
<td>Selected the teacher from the drop down menu</td>
</tr>
</tbody>
</table>

To assign this resource to a student:

1. On the Home page, perform a quick search to locate and open the record of the student in question.
2. On the Student Demographics page, in the Control bar, click Schedule.
3. On the Student Schedule page, from the Actions menu, click Add Resource Assignment.
4. On the Add Resource Assignment page, complete the following fields and click OK:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Enter/Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource service</td>
<td>Select the resource service from the drop down menu, for example: Remedial Reading</td>
</tr>
<tr>
<td>Comment</td>
<td>Enter any applicable comments.</td>
</tr>
<tr>
<td>Start (date)</td>
<td>Enter the applicable start date.</td>
</tr>
<tr>
<td>Instructional model</td>
<td>Select either “Inclusion in regular classroom” or “Pulled out to room”</td>
</tr>
<tr>
<td>Teacher</td>
<td>Select the teacher if one is not already pre-selected</td>
</tr>
<tr>
<td>Minutes per week</td>
<td>Enter the number of minutes per week</td>
</tr>
</tbody>
</table>
Add a Subject Exception

Subject Exceptions are for those students who are working either ahead of or behind their peers in the same class. For example:

- You may have a grade 3 student who excels in Math and is therefore eligible to take Math 4. In SIM, you can assign the grade 3 student to Math 4 without removing him/her from the grade 3 homeroom.
- If the student is to be graded in the Math 4 class roster, you will need to do a class transfer for that student. A class transfer means that a student is physically pulled out of his/her Math 3A class to attend the Math 4 subject in room 4A. The student will appear on the roster associated with that Math 4A class, and the student is graded based on the roster to which he/she belongs.

The following steps detail how to add a subject exception for a student:

1. Perform a student search to locate and open the record of the student in question.
2. On the Student Demographics page, in the Control bar, click Schedule.
3. Select the checkbox next to the Subject to which you will be adding a Subject Exception.
4. From the Actions menu, click Add Subject Exception.
5. On the Add Subject Exception page, click the Subject dropdown and select a class associated with a higher grade level.
6. Click OK.
7. On the Change Options dialog, ensure Student’s first day in school this year is selected.
8. Click OK.

Undo a Schedule Change

The following steps detail how to undo a schedule change:

1. Perform a student search to locate and open the record of the student in question.
2. On the Student Demographics page, in the Control bar, click Schedule.

**EFFECTIVE DATE**

Note: You must apply an effective date to homeroom and class changes within a student's schedule. This field defaults to 1st Day in School, which should be used until school starts. After school starts, other options should be used, applicable to when the student started in school (such as Today or Specify). You also have the option of selecting a change reason.
3. On the **Student Schedule** page, from the **Actions** menu, click **View Change History**.

**Note:** When manual changes are made to a student’s schedule, a history of the change is displayed on the student’s **Schedule Change History** page.

To undo a change, select the checkbox next to the change in question and select **Undo Last**.
Appendix A: Understanding ES Scheduling Terminology

Although your school may use different scheduling terminology, it is important for you to understand SIM terminology since you will be using the system to support your scheduling activities.

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Class</td>
<td>A combination of a teacher, a room, and students. Classes are subject-specific.</td>
</tr>
<tr>
<td>Class Roster</td>
<td>A list of students who meet regularly to learn a subject from a specific teacher. When subjects are scheduled, students are automatically assigned to the corresponding class roster based on their grade level and homeroom assignment, assuming that the subject will be taught in the homeroom. However, students can be manually assigned to a class and, based on the number of students required to attend that class, the number of class rosters needed may be more than one.</td>
</tr>
<tr>
<td>Homeroom</td>
<td>A group of students (usually at the same grade level) who spend most of their time together. It is the location where this group has attendance taken and can also learn core subjects such as Math.</td>
</tr>
<tr>
<td>Meeting Pattern</td>
<td>A defined set of periods and days in which a class can be offered. When a class is created, you have the option of assigning a meeting pattern.</td>
</tr>
<tr>
<td>Subjects and Subject Elements</td>
<td>A subject is an area of study taught to students in a certain grade. For example, Chicago Reading Framework, Writing Standards, etc. Subjects are designated as either core or specialty. Core subjects are typically taught to all students in a grade, whereas Specialty subjects might be taught to some or all students in a grade.</td>
</tr>
<tr>
<td>Subject Framework</td>
<td>Each subject belongs to the Subject Framework, which is a grid of all subjects, corresponding subject elements, and grade levels to which these pertain. The district defines the Subject Framework and has flexibility in determining which subjects and corresponding subject elements should be taught to particular grade levels. Once the Subject Framework is finalized, the district assigns and publishes it to the elementary schools. Each school then determines which subjects they will offer to each grade level for the school year.</td>
</tr>
</tbody>
</table>