Contents

I. Elementary Scheduling Process Overview ................................................................. 7
   Synergy & CSIS - Student Enrollments ................................................................. 7
   Elementary Schedules ......................................................................................... 7
   Next Year Schedules ......................................................................................... 7
   Course Numbers ................................................................................................. 7
   Schedule Changes ............................................................................................... 8
   What is a Section? ............................................................................................... 8
   How Are Schedules Sent to the Gradebook? ....................................................... 8

   Elementary Scheduling - General Guidelines New SY19-20: Only 12 Periods .......... 8
   Periods for Elementary Scheduling .................................................................... 8
   Specials Scheduling (Art, Music, & PE) ................................................................. 9
   Departmentalized Schedules ............................................................................. 9
   Pre-K Scheduling ............................................................................................... 9
   Scheduling Lab Teachers ................................................................................... 9
   Paraprofessionals ............................................................................................... 10
   Short Term Placeholder for Staff Name on Sections .......................................... 10
   How to Schedule Supply Teachers (Note: Check the box to Exclude from State Reporting) ................................................................. 11

II. Synergy Navigation & Basic Options ................................................................. 13
   Selecting the Synergy Focus ............................................................................. 13
   How to Select the Blue Synergy Screen or a Custom Color ............................... 14
   The Navigation Menu ....................................................................................... 15
   The PAD Tree Menu ......................................................................................... 16
   The Bookmarks Menu ....................................................................................... 17
   The History Menu ............................................................................................. 18
      Continue Where You Left Off – Viewing Screen History ................................ 19
      New Feature Assist Messages ....................................................................... 19
   Quick Launch Search ....................................................................................... 20
   Using the Link Icon to Search ........................................................................ 21
      How to use the Advanced Mode Search ....................................................... 22
   How to Search and Find Students .................................................................... 23
   Adding a New Teacher to Synergy ................................................................... 24
   Adding Room Numbers ................................................................................... 24
IMPORTANT: Deleting Students from a Teacher’s Section AFTER the First Day of School (Closing a Section) ............................................................. 49

Scheduling a Single Student .................................................................................................................. 50
  Add a single class to a student’s schedule .......................................................................................... 50
  Add multiple classes to a student’s schedule ..................................................................................... 51

Reactivating a Student .......................................................................................................................... 53
  Reactivating a Student Before the School Year Begins ................................................................. 53
  Reactivating a Student During the School Year .............................................................................. 54

Changing a Student’s Schedule BEFORE the First Day of School ..................................................... 55

IMPORTANT: Changing a Student Schedule AFTER the First day of School ................................. 58

Scheduling Students in Homeroom Using Assign Students to Sections Screen ............................ 59

Verifying Homerooms Using the Class Assignment Screen ......................................................... 61

Assign Students to Sections - Copying Students from One Section to Another ............................. 63

Using the Assign Additional Staff Screen ......................................................................................... 64

Combining Elementary Sections into One Main Class (Optional) .................................................. 66
  Before and After Gradebook Examples .......................................................................................... 67
  Steps for Departmentalized Schedules: ........................................................................................... 68
  Combined Gradebook Sections Scenarios: ....................................................................................... 69

III. Creating Schedules for the Next School Year ............................................................................. 70

Creating Next Year’s Sections from Scratch: .................................................................................. 70

Creating Next Year’s Sections Using a Copy of the Current Year: .................................................. 71

Once the Master Schedule for the next school year has been entered into Synergy and confirmed as correct: ................................................................................................................................. 72

IV. Guidelines for Scheduling Student Services .............................................................................. 73

Gifted Scheduling ................................................................................................................................. 73
  **Gifted students must have a CSIS Services Screen. ................................................................. 73
  A. Gifted Resource Model ............................................................................................................... 73
  B. Gifted Cluster Model .................................................................................................................. 73
  C. Gifted Collaborative Model (Note: Additional Staff Required) ................................................ 74
  D. Advanced Content Model - 4th and 5th Grade (Language Arts, Reading, &/or Math) 74

Early Intervention Program (EIP) Scheduling .................................................................................. 76
  **EIP students must have a CSIS Services Screen. ....................................................................... 76
  A. EIP Self-Contained Class ........................................................................................................... 76
  B. EIP Reduced Class ..................................................................................................................... 76
C. **Supplemental Instruction Intervention (When used with EIP Self-Contained or EIP Reduced Class)** ................................................................. 77
D. **EIP – Augmented/Push In** ................................................................. 78
   Adding Additional Staff ......................................................................... 78
E. **EIP – Pull Out:** .................................................................................. 79
   Adding Additional Staff ......................................................................... 79

Special Education Scheduling .................................................................. 80

**Special Education students are flagged for Goal View in CSIS.** ............... 80
Special Ed Delivery Models **NEW SY2019-20** ........................................ 80
A. **Special Education – Self-Contained Classes (i.e.: MOID, AU, BD, etc.)** .... 80
B. **Special Education – Pull Out/Small Group Classes** ............................. 81
C. **Special Education – Collaborative/Co-Taught Classes** .......................... 81
   Adding Additional Staff ......................................................................... 82
**IMPORTANT STEP: Special Education – Collaborative/Co-Taught Classes:** .. 82
D. **GAA 2.0 – Georgia Alternative Assessment** ........................................ 82
E. **Special Education – Consultative Model Classes** ................................. 83

ESOL Program Support Scheduling ............................................................. 84

**EL students must have a CSIS Services Screen.** ..................................... 84
NEW SY2019-20: **ESOL teachers no longer need sections with a 55.X course number.** 84
A. **ESOL Push In:** .................................................................................. 84
   Adding Additional Staff for ESOL Push In ............................................. 84
B. **ESOL Pull Out:** .................................................................................. 85
   Adding Additional Staff for ESOL Pull Out: **NEW SY2019-20** ............... 85
C. **Approved Innovative Model (Requires approval from the ESOL Department)** .... 86

Dual Language Immersion ......................................................................... 87

SY2019-20: Grades K – 4th /Approved Schools Only ..................................... 87
Dual Language Immersion Classes: non-English Classes ............................... 87
Add the Dual Language Delivery Model to English Classes for Students Receiving ESOL Support **(Updated for SY2019-20).** ......................................................... 88

V. Synergy Reports ...................................................................................... 89
A. **Report STU202: Student Schedule** ................................................... 89
   Printing STU202 by Services - Gifted Students, EL Students, Special Ed., or EIP Students 90
   Review of Students’ Schedules .................................................................. 91
B. Report MST406: Open Periods .................................................................................................................. 92
C. Report MST402: Section List by Teacher .................................................................................................. 94
   How to Get a Room List Using Section List by Teacher - MST402 .......................................................... 95
D. Report MST403: Section List by Course and Term ...................................................................................... 95
E. STU401 – Student List .................................................................................................................................. 96
F. STU408 – Class List ...................................................................................................................................... 98
G. STU601 – Active Student Totals .................................................................................................................. 100
H. STU409 – Class Roster ................................................................................................................................... 101
VI. OnTrack Scheduling Reports ...................................................................................................................... 102
Tips To Look For Scheduling Errors: .................................................................................................................. 102
   Navigation: CCSD Portal > OnTrack > Reports > Schedules > select from the list below - 102
A. Class Entry and Leave Date Outside Enrollment (SSP3214) ...................................................................... 102
B. Elementary Student Schedule Alerts (SSP4643) ............................................................................................ 102
C. Class Entry and Leave Date Outside Enrollment (SSP3214) ...................................................................... 102
D. Section Errors Include/Exclude Attend/Grading (SSP4644) ........................................................................ 103
E. Staff History Start Date Discrepancy (SSP4656) ............................................................................................ 103
I. OnTrack Reports ............................................................................................................................................. 104
   Navigation: CCSD Portal > OnTrack > Reports > VARIOUS TOPICS > select from the menu list 104
II. OnTrack Queries ............................................................................................................................................ 104
   Navigation: CCSD Portal > OnTrack > Queries > VARIOUS TOPICS > select from the menu list 104
I. Elementary Scheduling Process Overview

Synergy & CSIS - Student Enrollments

Students are enrolled at schools using CSIS (Cobb Student Information System), which is located in the CCSD Portal. After an enrollment is completed, the student’s record will import into Synergy approximately 10 to 15 minutes later and a schedule can be created, in Synergy, at that time. Schedules are created and edited only in Synergy.

Updates to students such as parent information, address or phone number changes, contacts, etc., must be done in CSIS. Then, the information will update in Synergy either during the day or through a nightly process.

Elementary Schedules

Elementary scheduling is a record of the services that students receive, not an actual reflection of where the students are for a particular period of the day. Courses must be scheduled in Synergy for three reasons: (1) Required for state reporting, (2) Required for Attendance tracking, and (3) creating Gradebook classes to maintain assignments, grades, and report cards.

Next Year Schedules

Around Spring Break of each year, registration is held for kindergarten and new first grade students for the next school year. The students are enrolled in CSIS on a special form for ‘next school year enrollments.’ About the same time, school administrators begin planning the next year’s teaching assignments and classroom models to be used in all grade levels. This is also the time for schedulers to work with administrators to make a scheduling plan for next year. Creating Schedules for the Next Year, found later in this guide, provides details about how to begin planning for your next year schedules.

Course Numbers

Elementary scheduling is complex. Using the correct course numbers is critical to ensure appropriate state reporting of student data. Below is helpful information for understanding course numbers.

Course numbers are grade-level and service specific. It is important that students are scheduled in course numbers that match their grade level. Use the Master Course list, found in Synergy Help > ES Scheduling, to find course numbers listed by grade levels.

The first two numbers before the decimal indicates the content area. Below are a few examples.

- 23 Language Arts / 23.xxxxxxx
- 45 Social Studies / 45.xxxxxxx
- 36 Physical Education / 36.xxxxxxx
- 27 Math / 27.xxxxxxx
- 40 Science / 40.xxxxxxx
- 17 Health / 17.xxxxxxx

The first number after the decimal explains the type of instruction (service) the students are receiving.

- .0 General Education / xx.0xxxxxx
- .1 EIP / xx.1xxxxxx
- .2 Gifted / xx.2xxxxxx
- .8 Special Education / xx.8xxxxxx (self-contained or teacher pulls out student for one on one support or small group)
- .9 Special Education / xx.9xxxxxx (collaborative/co-taught teacher goes into the classroom to support the student.)

This document provides guidelines for scheduling students in General Education, Gifted, EIP, Special Education, and ESOL classes.
Schedule Changes
If a student’s services change during the school year, it is imperative to give the data entry clerk complete information as soon as possible so the Synergy schedule can be updated appropriately and in a timely manner. **Service changes should be reflected in the student’s schedule in Synergy within 48 hours of the change in service.**

What is a Section?
In scheduling, a section is another name for a class. Each section has a unique number that Synergy assigns when the class is first created in the system. A section contains a great deal of information such as a course number, a period of the day, and various delivery models depending on what type of class is being taught. The section is assigned to a teacher of record and students are scheduled into the section or class. Steps for creating a section begin later in this guide.

How Are Schedules Sent to the Gradebook?
When a section is created for a teacher and students added, teachers will see the section and students in their TeacherVUE seating chart. However, a Grade Book Synchronization is required and at least one student must be scheduled in a section before the teacher will see the section and student(s) in the gradebook.

A Districtwide synchronization runs each Monday – Friday at 4:00 AM during the school year. The synchronization does not run on the weekends or during the summer.

When schedule additions or changes are made during the school year, the teacher will see an update in their gradebook after the next synchronization. If a special situation exists, and the teacher must see the change in their gradebook the same day, a manual synchronization can be done for your school. Please enter a help ticket or contact a member of the Synergy Team to request a manual synchronization for your school.

Elementary Scheduling - General Guidelines [New SY19-20: Only 12 Periods]
- K-5 scheduling consists of **10 required courses**, shown below in periods 1st – 10th.
- Schedule courses shown below in periods 11th – 12th only when appropriate for the students’ services.
  - Please schedule ALL Homeroom sections in 1st Period. Attendance is taken only in the homeroom section.
  - Homeroom sections are always: INCLUDED IN ATTENDANCE & INCLUDED IN GRADING
  - All other sections (non-homeroom) must be EXCLUDED FROM ATTENDANCE & INCLUDED IN GRADING

<table>
<thead>
<tr>
<th>Period</th>
<th>Course</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st</td>
<td>Homeroom</td>
</tr>
<tr>
<td>2nd</td>
<td>Health</td>
</tr>
<tr>
<td>3rd</td>
<td>Language Arts</td>
</tr>
<tr>
<td>4th</td>
<td>Reading</td>
</tr>
<tr>
<td>5th</td>
<td>Science</td>
</tr>
<tr>
<td>6th</td>
<td>Mathematics</td>
</tr>
<tr>
<td>7th</td>
<td>Social Studies</td>
</tr>
<tr>
<td>8th</td>
<td>Physical Education</td>
</tr>
<tr>
<td>9th</td>
<td>Visual Arts</td>
</tr>
<tr>
<td>10th</td>
<td>Music General</td>
</tr>
<tr>
<td>11th</td>
<td>Gifted Resource, if needed</td>
</tr>
<tr>
<td>12th</td>
<td>World Language, if needed</td>
</tr>
</tbody>
</table>

Periods for Elementary Scheduling

<table>
<thead>
<tr>
<th>Period</th>
<th>Course</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st</td>
<td>Must be used for Homeroom</td>
</tr>
<tr>
<td>2nd</td>
<td>2nd - 7th Periods can be used for all core subjects</td>
</tr>
<tr>
<td>3rd</td>
<td></td>
</tr>
<tr>
<td>4th</td>
<td></td>
</tr>
<tr>
<td>5th</td>
<td></td>
</tr>
<tr>
<td>6th</td>
<td></td>
</tr>
<tr>
<td>7th</td>
<td></td>
</tr>
<tr>
<td>8th</td>
<td>8th – 10th Periods can be used for all Specials</td>
</tr>
<tr>
<td>9th</td>
<td></td>
</tr>
<tr>
<td>10th</td>
<td></td>
</tr>
<tr>
<td>11th</td>
<td>11th Period can be used for Gifted Resource</td>
</tr>
<tr>
<td>12th</td>
<td>12th Period can be used for World Language (i.e.: Spanish)</td>
</tr>
</tbody>
</table>
Specials Scheduling (Art, Music, & PE)

Students who attend specials classes together should be scheduled in the same sections. For example, if a teacher’s homeroom splits between two specials in the same period, schedule each special’s class in a different section. Part of a class can be added to another teacher’s section, if that group always attends specials with the other teacher.

**NOTE:** If your school includes Health as a specials rotation, the Health teacher must be the teacher of record on all of the Health sections. It does not need to be 2nd period, but can be scheduled adjacent to other specials.

Departmentalized Schedules

If students change teachers during the day for their core subjects, your school may be utilizing departmentalization. **Schools that departmentalize must ensure that the teacher of record on the section, for the departmentalized subjects, is the one delivering the instruction.** This is required for proper assessment association in CTLS and the gradebook. It is also required to establish complete and accurate growth measures for the teachers, and therefore should be a yearlong commitment from the teachers.

Pre-K Scheduling

There are different types of Pre-K services. Check with your administration to understand the type of Pre-K at your school.

<table>
<thead>
<tr>
<th>Pre-K Students</th>
<th>Special Ed &amp; Special Needs Pre-K students are scheduled in the three courses listed at the left.</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Period – Homeroom</td>
<td>Pre-K speech students only need to be scheduled in Homeroom. They do not need Literacy and Numeracy sections.</td>
</tr>
<tr>
<td>2nd Period – PK-Literacy</td>
<td></td>
</tr>
<tr>
<td>3rd Period – PK-Numeracy</td>
<td></td>
</tr>
</tbody>
</table>

- If one Pre-K class has both 3 and 4-year olds, create separate sections of Literacy and Numeracy so the students who are 4 as of September 1st can be added in one section and students who turn 4 after September 1st can be added in the second.
- All the students, in the same class, can be added to the same Homeroom section.
- If a Pre-K teacher is not a CCSD employee use Term, Short as the primary teacher of record on all of his/her sections.

Scheduling Lab Teachers

- Certified teachers in a lab environment are **Contributing Professionals**. They do not need to be scheduled in Synergy. **IMPORTANT: DO NOT ADD CONTRIBUTING PROFESSIONALS AS ADDITIONAL STAFF ON ANY SECTIONS IN SYNERGY.**
- If the teacher is not a Contributing Professional, he/she should be scheduled in Synergy.
  - Depending on the position, the teacher will be the primary teacher of record or added as additional staff on the content area where they teach.
  - This document provides several examples of how to add additional staff. If additional assistance is needed, please contact a member of the Synergy Team or enter a Web Help ticket.
- If clarification is needed about a teacher’s status as a Contributing Professional, an administrator should contact **Evaluation Systems in Human Resources** for explanation. (770-426-3393)
Paraprofessionals

- Do not add paraprofessionals as additional staff on sections.
- Add the number of paraprofessional employees, assigned to provide support to the entire class, in the field provided on the section screen.
- Add the number of paraprofessionals to any subject/core section, Health, or Physical Education section when support for the entire class is provided.
- Paraprofessionals do not need to be added to homeroom sections.

Short Term Placeholder for Staff Name on Sections

Before school begins, review all sections at your school using the Synergy Report - MST402. Ensure that all of the sections listed for the teachers are the correct grade levels and/or courses that they teach.

- Do not leave a teacher listed as the teacher of record on a section if they are no longer employed at your school.
- If a new teacher has not yet been hired, use ‘Term, Short’ as the Staff Name on all the sections that have been created for the new teacher.

During the school year, if a teacher leaves the school and a replacement teacher has not yet been hired, the staff name on all sections must be ‘Term, Short’ until a new teacher is hired.

- Be sure that every section where the original teacher is listed as the primary teacher of record is edited to reflect Term, Short for the Staff Name.
  - Use the MST402 to identify all sections that need to be edited.
- Review the Staff History Tab, on all of the sections, to ensure that there is no gap in time.
  - The Short Term staff’s effective date should be the first school day that the prior teacher is no longer employed at the school.
- When a replacement teacher is hired, review the Staff History Tab again to confirm the effective date is correct.
  - The new teacher’s effective date should be the first day he/she begins teaching the students in the sections.

NOTE: Do not use an administrator as a placeholder on any section screen.
How to Schedule Supply Teachers (Note: Check the box to Exclude from State Reporting)

If a teacher will be out for an extended period, and a supply teacher is hired, the supply teacher can be added as Additional Staff on the Additional Staff Tab of the section.

The original teacher should remain on the section as the teacher of record. Be sure to follow the steps below for each section the supply teacher will teach while the staff member is out. (NOTE: This is only done in a supply situation. Do NOT add substitute teachers into Synergy.)

a. If the supply teacher’s name cannot be found in Synergy, add them to CSIS Staff Maintenance as a TEACHER. WAIT for an overnight cycle to run. The next day, the supply teacher will be in Synergy.

b. Contact Customer Care or a Synergy Team member to request Synergy roles for the supply teacher. Synergy roles are required so the supply can login and access Synergy TVUE/Grade Book.

c. On each desired section, add the supply teacher to the Additional Staff Tab.

d. On the Additional Staff Tab, click “Chooser” to search for and add the supply teacher.

e. Enter the appropriate Start Date for the supply teacher.

f. No selections are required under the Contributions heading, Responsibility drop down menu.

g. On the Homeroom section, be sure to add Update security so the supply teacher can take attendance.

h. Security access for the TVUE and grade book areas is decided by local school administration.

   o If the supply teacher will be taking attendance, select ‘Update’ for the attendance security on the Homeroom section.

   o If the supply teacher will be using the grade book, (4th & 5th grades) select one of the following Grade Book security options: Manage Assignments, Post Grades, or All Class Tasks.

   o If the supply teacher will be responsible for report cards, All Class Tasks security is needed.

Additional steps are listed on the next page.
i. Check the box to exclude the record from State Reporting.

![Exclude From State Reporting]

j. When the staff member returns from leave, be sure to put an End Date (last day worked) for the supply teacher’s record on the Additional Staff Tab.
   - Adding a leave date for additional staff will move the record to the Staff History Tab on the section screen. Edits must be made to the dates, when needed, even on the history tab.
II. **Synergy Navigation & Basic Options**

**Selecting the Synergy Focus**

The *Synergy Focus* refers to the school, the year, and the enrollment status of the students a user is set to view in Synergy.

1. Click on the area in the upper right corner of the Synergy screen where your name, the name of the school, and school year display.

2. When the Change Focus window displays, use the *Year* and *Organization* (school) drop down and radial options to select the parameters needed for the focus.

   For schedulers, it is recommended you select ‘Show Active and Inactive.’ This option allows schedulers to search and find students who are active and inactive at the school.

3. Review your focus to ensure you are scheduling in the correct school year. **The color of the Synergy screen is important.**

   - When working in the *next school year*, the screen will be **BROWN**.
   - The current school year will be a **BLUE** screen.
   - A *prior school year* will be a **GREEN** screen.
     - Do not change schedules in a prior year.

4. Click the Save button to change focus to the selected parameters.

*Note:* Inactive students display in Synergy with parenthesis around their names.
How to Select the Blue Synergy Screen or a Custom Color

The Synergy screen may default or revert to white instead of the custom blue color. To change the screen, follow the steps below.

1. Point the mouse to the small gear icon located just under the name of your school. The Options box will display.
2. Check the box next to ‘Show High Contrast.’

![Options screenshot]

3. Select the option for the **Blue Screen** in the drop down that will display under the Show High Contrast area.

![Options screenshot]

4. If desired, you can customize the screen color to something different as long as you are focused to the current school year. **Prior years (green screen) and future years (brown screen) cannot be customized.**

![Options screenshot]

5. Select **Custom** from the drop down and the desired color from the selector.

![Options screenshot]
The Navigation Menu

1. Point the mouse over the Navigation icon located on the left side of the Synergy screen. See the screen shot below, left. This will be in the area that the navigation menu displayed in previous versions of Synergy.

![Navigation Menu Screen Shot](image1)

2. Click the pin icon that displays after the word, Navigation. This will dock the navigation panel and keep the names of the items visible in the menu.

3. Click the pin icon again to undock the Navigation Panel so it only displays when you point to the Navigation menu.

4. The quick link icons associated with a user group’s access will display in the different submenus. The submenus may appear at the bottom of the Navigation panel (Example below > point to the word *Schedule* or *Reports* to see the associated icons.)

![Navigation Panel with Icons](image2)

5. Click the desired icon to go directly to that screen.
6. Users can view items in the Navigation Menu using an **Icon View** or **List View**.

The PAD Tree Menu

1. Point the mouse over the PAD Tree icon located on the left side of the Synergy screen.

2. The PAD Tree menu will display.

3. Click Synergy SIS to see the menu options.

4. Click the pin icon to dock the PAD Tree menu so it continues to display on the left side of the screen.

5. Click the pin icon again to undock and remove the PAD Tree menu so it only displays when you point to the Tree icon.
The Bookmarks Menu

1. Point the mouse over the Bookmarks icon on the left side of the Synergy Screen.

2. The Bookmarks menu will display.

3. Like the Navigation and PAD Tree menus, Bookmarks can be docked to display at all times. Click the pin icon to dock the panel and click it again to undock the panel.

4. Bookmark any frequently used screen, report, or process by clicking the bookmark icon located to the right of the screen title. It will display in the list of Bookmarks.

5. To delete a bookmark from the list, point the mouse to the menu item and click the click the ‘X’ that displays at the end of the row.

6. To open a bookmark in a new window, click the new window icon shown next to the ‘X’.
The History Menu
Synergy has a feature that tracks the screens and reports you visit and lists them in a History menu.

1. To view the History panel, point to the mouse over the History icon (similar to an asterisk) located on the left side of the Synergy screen.

2. As with the other menus, lick the pin icon to dock the panel and click it again to undock the panel.

3. While the History Panel displays, point to any icon. The last date/time the screen was accessed displays. Click the icon to go directly to the screen or report.

4. To open a screen or report in a new window, click the icon that displays at the end of the row.

5. To remove a screen or report from the History list, click the ‘X’ at the end of the row.

6. To clear the entire History list, click Clear at the top of the panel.
Continue Where You Left Off – Viewing Screen History

Similar to the History list is a new option that allows users to view and select recent screens.

![Viewing Screen History](image)

1. Point to the viewing screen icon located on the left side of the Synergy screen.
2. Use the arrows to scroll up or down in the list of options.
3. **Click an icon** to go directly to that screen or report.
4. Click the ‘open in a new window’ icon at the end of the row and the screen or report will open in a new window.

New Feature Assist Messages

Synergy displays message windows about new features, like the one shown above in the top screen shot.

- Click the **Next** button to see descriptions of the new feature.
- Some message windows may have several description pages. Click **Next** on each window to review them all.
- When the last message window, for a particular feature displays, click the **Got It!** button.
- **Clicking Got It! will stop the messages from displaying when you open that Synergy screen again.**
- Clicking the X at the top of the message window will not stop them from showing up the next time you login and open the Synergy screen.
Quick Launch Search
Use the quick launch search box as a fast way to access a screen or report.

- Type the name of a screen or report. Partial searches will offer a list of options.
- Click on the desired screen or report to go directly to the selection.
- Use the icon shown to the right of the screen or report name to open the option in another window.

The Quick Launch drop down offers suggested general topics for searching. Example, click the Student icon to see a list of suggested screens or reports for students.
Using the Link Icon to Search

Synergy uses a link icon to search for information on numerous screens. The example below shows a search on the Section screen for a course number.

- Click the link icon.
  A search box will display under the selected field.

If the search box does not display, and the Advanced Search opens instead, **click the option to Toggle Advance Setting** on the top right side of the search window. Then, **close** the window.

![Link Icon Example](image)

- Click the link icon – the search box should display under the selected field.

**EXAMPLE** -

- Begin typing the first few numbers of the course number in the field.
- Key in the entire course number and it will display as a selection in the blue area underneath the field where you are typing.
- If a partial number search is used, move the mouse over the list of options that display under the field where you are typing. Highlight the desired number, as shown above.
- **Click the desired course number** to select it so it displays in the Course ID field.
- The Course Title will automatically fill in based on the course number selected.
- Continue using the same process to add Staff Name, Room Name, and Linked Staff Name.
- Click Save to save all selections.
How to use the Advanced Mode Search

After clicking the link icon, click Advanced.

This will open a Find window.

1. Enter search criteria in the field.
2. Press the Enter key or the Find button at the top of the screen.
3. When the results display in the Find Result area, click the row to highlight it.
4. Click the green Select button at the top of the screen. (Or, double click on the row to select it.)

The Find window can be closed without adding a selection by clicking the orange Close button. Use the red Clear Selection button to clear anything in the fields and return to the original screen.

Users can click the option to Always Use Advanced Mode, if desired, to go directly to the advanced find window anytime the link icon is clicked. See the screen shot at the top of this page.

To change back to using the search window instead of Advanced, click the icon shown below on the Find window.

The Advanced Find Window can be used to search for course numbers, staff names, and rooms.
How to Search and Find Students

To search for a student you must be in Find or Search mode. As shown in the example below, the fields on the screen are yellow and ready for search criteria to be entered into one or more of the fields.

*Note:* This same process is used on other Synergy screens, for example the Section screen.

- Search by a student’s name or CCSD ID. Type the information into the appropriate field and press the Enter key or the blue Find button at the top of the screen.

- If more than one student in the school has the same last name, the results will display alphabetically by the students’ first names. Therefore, when searching for ‘Smith’ for example it would be helpful to enter at least part of the first name. Use CCSD ID when it is known for the most efficient results.

The student screen will display for the student. Information about the student will be listed at the top of the screen. The different tabs (Demographics, Parent/Guardian, Classes, etc.) display information for the student.

To search for another student, click the Search Icon at the top of the screen to go back into Find or Search mode.
Adding a New Teacher to Synergy

When a new teacher is hired at your school, the teacher must be added to **CSIS Staff Maintenance** with the appropriate job information and start date.

The Synergy scheduler, the school secretary, or another person at your location may complete this task. Be sure to designate someone to complete this task when new teachers are hired.

After new staff members are added to CSIS Staff Maintenance, a nightly process is required to load the teacher into Synergy. Therefore, you will need to wait for this process to run until you can add a new teacher’s name on a section.

**NOTE:** When working on next year’s schedules, new teachers do not roll into Synergy for the next school year. In the spring, when new teachers are hired for the next school year, add them to CSIS Staff Maintenance with the appropriate job information and start date. Then, contact a member of the Synergy Team to manually add the teacher to your next year’s focus.

- Additional information about scheduling for next year is available in this document.

Adding Room Numbers

If you cannot find a room number when using the search feature on a section screen, use the steps below to add the new number to your school.

1. In the Quick Launch box at the top of your screen, type **School Room** and press Enter.
2. Click Add at the top right portion of the screen.
3. Scroll to the bottom of the list looking for the new row that was added.
4. Enter the new room number in the first green field and the current school year in the second green field.

   **Note:** The school year will be listed on existing room numbers.

   **Hint:** School Year 2017-18 displays as 2017. Use 2019 for 2019-20. Use 2020 for 2020-21 and so on.

5. After adding the room and school year, click Save at the top of the screen. The room is now available to be added to a section.
Synchronizing Student Seat Totals on Sections

Run this process during summer and pre-planning as schedules are being created. Also, run it during the school year when schedules are added or changed, and any time to correct errors in the student seat totals area.

It is very important to periodically synchronize section totals while making schedule changes or if you notice errors in the student seat totals area (see the screenshot above.) This is particularly true when several staff members are working on schedules simultaneously. **Synchronizing will ensure that the seat totals displayed on both the section screen and on reports are accurate.**

NOTE: This is NOT the same as a Grade Book Synchronization mentioned in other areas of this guide.

To update the totals in the Student Seat Totals:
1. Open the **Section** screen to any section.
2. Click the **Menu** button at the top of the page.
3. Select **Synchronize All Section Totals** to update the totals for **all sections** at the school in focus.
4. **Please wait** for the process to complete.

![Job Details](image1.png)

5. A message will display and alert you that the synchronization is complete. Click OK to close the window.

![Synergy](image2.png)
Updating Homeroom Data
Do This After You Have Assigned Students to Homerooms

1. In the Quick Launch box at the top of your screen, type School Setup and press Enter.
2. Verify that the Homeroom period listed on the School Setup screen is correct.
3. Click on Menu
4. Click on Update Homeroom Data

5. Please wait for the process to complete. A message window displays with job result files.
6. If desired, click the icon for the TXT extract file to view a list of students and the number of updates processed.

Note: All grade level homerooms must be scheduled in first period.
If you add a homeroom, change a homeroom or move students, etc., be sure to re-run this process, as this will affect the printing of homerooms on student schedules, report cards, etc.
Adding a New Section

1. From the Navigation Menu: Schedule > Section
2. Click Add.

3. The Add Section screen (below) displays.
4. Click the link icons for Course ID, Staff Name, and Room Name to enter or search for the correct course, staff name, and room number to add to the new section.
   a. If using Linked Sections Scheduling Option, add the Linked Staff Name if needed.
5. The Course Title will be populated automatically based on the Course ID number.
6. Fill in the other GREEN fields – Begin and End Period, Term Code (YR), and Max (class size).
7. Attendance & Grading Options
   o Using the drop down arrows, choose the correct selection for Attendance Option and Grading Option.
   o Selections are required for both of these fields – do not leave them blank.
   o Homeroom sections are always: INCLUDED IN ATTENDANCE & INCLUDED IN GRADING
   o All other sections (non-homeroom) must be EXCLUDED FROM ATTENDANCE & INCLUDED IN GRADING (*ESOL & Gifted Resource sections are the exceptions to this rule.)
8. Enter the number of parapros assigned to provide support to the entire class.
   b. This does not include parapros working one-on-one with a student.
9. If the class is using a Gifted, EIP, or ESOL Delivery Model, add the appropriate selection using the dropdown provided.

If you do not want to add students at this time, click the Save button to complete the new section. If you want to add students, continue with the steps below.
Adding Students to the New Section Using Grade Level

1. If you know which students are going to be in this section, you can add them now by scrolling down on the Section screen to the Students line. Click the Chooser button on the right side.

2. On the Chooser screen, use the drop down arrow to select the appropriate grade level and click Find at the top of the window. Click on desired rows to select students from the list and move them to the Selected Items side of the screen.

3. When you have completed your list, click Select at the top of the window to add students to the section.

4. This will return you to the Section screen you were originally adding and the selected students’ names will display at the bottom of the screen.

5. Edit the students’ Enter Date as needed. The date will default to the current date once the school year begins. If you are scheduling in the ‘next school year’s focus,’ the begin date will default to the first day of school for that year.

6. Confirm all fields are complete and click the Save button to complete the new section.
7. Once saved, the new section is created and displays the Section ID that is automatically added by Synergy.

Adding Students to the New Section Using Student CCSD ID

1. After clicking on **Chooser**, type students’ ID numbers in the CCSD ID box and press the Enter key. This adds students to the **Selected Items** grid.

2. Click **Select** at the top of the window when you have added all students to the list. The Chooser screen will close and return you to the Section screen.

3. When you are satisfied that the section information is correct, click on **Save**.

4. The next screen should then be your new section number, if you were in the process of adding a new section.

Note: Students can be added to a section at any time using the Chooser screen – before or after the Section ID displays.
Duplicating a Section

1. From the Navigation Menu: Schedule > Section
2. In the Find Mode (blank yellow fields) type in or choose from the fields you know.
   - If you know the Section ID, enter it (use leading zeros; sections are four digits)
   - Or, type the teacher’s last name in the Staff Name field. Select from the list, below the search window, if more than one teacher has the same last name add a first name to the search.
   - Press Enter to see the Find Result window of all sections for the teacher.
   - Double click the row of the section you want to duplicate.

3. When the section appears, Click on Menu and choose “Duplicate Section.”
4. The Add Section screen opens. **IMPORTANT: ALWAYS REVIEW THE SCREEN BEFORE MAKING CHANGES.** If you do not see the words Add Section at the top of the screen and asterisks in the Section ID field – YOU DID NOT CLICK ON DUPLICATE SECTION, as described above in step 3.

![Add Section Screen](image)

5. Make all applicable changes to the Section.
   a. Use the link icon to the right of Course ID, Staff Name, and Room Name to search.

Change Begin and End Period, Max (class size), and Attendance/Grading Options if necessary.

1. Change the Attendance and Grading Options, if necessary.
   a. Homeroom Sections – Include in Attendance and Include in Grading
   b. Other Course Sections (non-homeroom) – Exclude from Attendance and Include in Grading.

![Add Section Screen](image)

**Load Students from Original Section to the Duplicated Section**

1. **IF YOU WANT TO COPY THE SAME LIST OF STUDENTS FROM THE DULPICATED SECTION AT THIS TIME,** click on the bar “Load Student Enrollments from Duplicated Section.”
2. You MUST click on this bar BEFORE Saving. (If you forget this step before you click on Save, you will have to copy the students using directions for “COPYING FROM ONE SECTION TO ANOTHER” to get the students in the section).
3. If you want to load additional staff from the original section, see the steps on the next page BEFORE saving.
4. If you do not want to load the additional staff and are satisfied that the section information is correct, click Save.
5. The next screen should then be your new section number.

Load Additional Staff from Original Section to the Duplicated Section

1. If you want to load the same additional staff from the original section to the duplicated section, click the **Additional Staff Tab**.
2. Click the button to **Load Additional Staff From Duplicated Section**.
3. You MUST click this button BEFORE saving the new section.
4. The additional staff names will display on the screen. Edit Start Dates, Responsibility, and TVUE Security as needed. (This information can still be edited after the new section is created.)
5. When you are satisfied that the section information is correct, click Save.
6. The next screen should then be your new section number.
**Staff Screen**

The Staff screen can be used to view all sections that a teacher has been added as the primary or additional staff.

1. In the Quick Launch box at the top of your screen, type **Staff** and press Enter.
2. On the Staff screen, enter search criteria using a portion or all of the teacher’s last name, first name, or Badge ID.
3. Press the Enter key or click the Find button at the top of the screen.

4. When the teacher’s Staff screen displays, click the **Schools** Tab.

5. Click the line for the school year you need to review. The row will highlight.
6. Click the **Show Detail** button.
7. Any section, where the teacher has been added, will display as *Primary* or *Secondary* in the **Type** column.
   a. The Period, Section ID, Course ID, and Course Title display along with the Room Name/Number.
   b. The Section ID’s are links. Click on any **section number** and that section screen will open in a new window.

8. Click the **Hide Detail** button to close the details of the teacher’s scheduled information.
9. **Tip**: Click the **History Tab** to see sections where the teacher was leave dated.
Changing a Teacher’s Name on a Section (Changing the Primary Teacher of Record)

**If the current teacher has a gradebook, already in use for the school year, BEFORE making any teacher changes see the sub-chapter below for Changing the Teacher on a Section When the Grade Book is in Use. Important steps to ensure students’ grades are not affected with the teacher change.**

1. From the Navigation Menu: Schedule > click Section
2. In Find mode, type in the Section ID, if you know it, and press the enter key. The section will display.
3. If the section ID is unknown, type the teacher’s last name in the Staff Name field or use the link icon to find the teacher’s name. Make sure it displays in the Staff Name field. Press the Enter key, or click on Find, when the name displays in the field.

4. All sections where the teacher is the primary teacher of record will be listed in a new Find Result window.
5. Click the line number to highlight and open the section that you want to edit.
6. Double click the line number to select the section and close the Find Result window.
7. After selecting the desired section, click on the link icon to the right of Staff Name.
8. Type in the new teacher’s name. Select it from the search list so it appears in the Staff Name field.

9. Use same method to change the Room Name, if necessary.
10. Click Save.

11. Click the Staff History Tab. If necessary, change the Effective Date for the new teacher. The date needs to be the actual first day the teacher began in the class.
12. When a warning message displays, click OK.

Note: If a teacher is changed on a section prior to the beginning of school, only the new teacher will display on the Staff History tab. Once the year begins, (after students have had seat time) the original teacher will remain with the section as part of the Staff History tab.

Review the Staff History screen to determine if an edit is needed for any of the teachers’ effective dates.

- OnTrack > Reports > Schedules > SSP4656 - Staff History Start Date Discrepancy. The report can help identify sections that may need edits to the Effective Dates for the teachers.
- The effective date for a section’s original primary teacher of record must match or occur before the earliest student’s entry date in the class.
- Additional staff’s entry dates may be accurate when they are after students’ entry dates. For example, a supply teacher may begin during the school year. Therefore, the supply’s effective date on the section needs to be the actual first day the teacher began supplying in the class.

Caution: Changing the Teacher on a Section When the Grade Book is in Use
If the school year has started and the teacher is using the Synergy gradebook, before making changes to the teacher of record review the steps below with the current teacher (if possible) and the school’s Gradebook Manager.

Original Teacher’s Gradebook: Reports & Screen Shots Needed

Before making any changes to the sections in Synergy, the original teacher’s grade book reports and information must be printed and screen shots taken to use for reference. This must be done by the original teacher or the school’s Gradebook Manager.

Change the Teacher’s Name on Sections

AFTER receiving word from the teacher or Gradebook Manager that reports and screen shots are complete, the scheduler will proceed with the steps to change the teacher’s name and edit all necessary sections. After the next gradebook synchronization completes, the new teacher will have access to the sections in the gradebook.

The new teacher will refer to the reports and screen shots taken, by the original teacher or gradebook manager, to set up their gradebook to match that of the original teacher. The teacher will review the students’ gradebook calculations to ensure all grades remain unchanged after the teacher change on the sections.
**Short Term Placeholder for Staff Name on Sections**

During the school year, if a teacher leaves the school and a replacement teacher has not yet been hired, the staff name on all sections must be ‘Term, Short’ until the a new teacher is hired.

- Be sure that every section where the original teacher is listed as the primary teacher of record is edited to reflect *Term, Short* for the Staff Name.
  - Use the MST402 to identify all sections that need to be edited.
- Review the Staff History Tab, on all of the sections, to ensure that there is no gap in time.
  - The Short Term staff’s effective date should be the first school day that the prior teacher is no longer employed at the school.
- When a replacement teacher is hired, review the Staff History Tab again to confirm the effective date is correct.
  - The new teacher’s effective date should be the first day he/she begins teaching the students in the sections.

**NOTE:** Do not use an administrator as a placeholder on any section screen.
**Linked Sections (Optional)**

The information below details instructions for scheduling elementary school students by using LINKED SECTIONS. This allows the scheduler to create the appropriate sections for homeroom (HR) teachers (all Core Subjects), link the Specials sections (PE, Art, and Music) to each HR teacher, and then completely schedule students by adding them to the homeroom section ONLY.

Be sure to check out the topic found later in this guide, *OnTrack Reports to assist with Linked Sections*.

The Linked Sections process is most helpful when mass scheduling all students in the school prior to the beginning of the school year. Schools are not required to use this optional process.

**Important Rules for Using Linked Sections**

Please be aware that this process is to be used for GENERAL EDUCATION students only. *Linked Sections should not be used for Special Ed self-contained unit classes.*

(*See exception noted below).*

- These are the students in a HR teacher’s class that receive general education course numbers for 100% of their schedule (all XX.0 course numbers).

- These are students that have 100% identical schedules.

- Linked Sections should not be used in a Departmentalized environment.

*ALSO, note that LINKED SECTIONS will work for students added directly to the HR Section, AND when the HR section is added to an individual student on the Student Screen/Classes Tab.*

If you have created any additional sections for the HR teacher with course numbers other than General Ed XX.0 (for example, XX.1, XX.9, XX.2, etc.), you MUST check the box on those sections to Exclude From Linked Section Process. Otherwise, the students will be incorrectly scheduled into these sections.

If your school has self-contained Special Ed classes such as MOID or BD, exclude ALL of the teachers’ sections since the teacher will have students from different grade levels in the same homeroom. These students will need to be scheduled without the Linked Sections process.

*An exception* to the rule of using the Linked Sections process for only General Education students would be if the majority of the students in your school (or particular classes) are EIP and teachers are using the EIP Reduced Class Model or EIP Self-Contained Model.

If this situation describes your school, please work with a member of the Synergy Team or a Student Reporting Specialist to ensure you have a clear understanding of how the sections should be excluded and how to schedule the students in the most efficient manner.
Changing School Setup to Accommodate Linked Sections

1. In the Quick Launch box at the top of your screen, type School Setup and press Enter.
   a. **IMPORTANT NOTE:** If you are working on Next Year schedules, the screen will be brown, as in the example below.
   b. After the New Year rolls up (in mid-July) the Synergy screen will be blue.
2. Scroll down the School Setup screen to the section titled Other Info.
3. Click the drop down for Scheduling Options, and choose Linked Sections.
4. Click Save at the top of your screen.

**NOTE:** Once you have scheduled all of the GENERAL EDUCATION students, remove the Linked Sections option from the School Setup screen BEFORE you schedule any students that receive special course numbers for any of their classes (Special Ed, EIP, and ESOL).

*How to Remove Linked Sections on the School Setup Screen (Turn Off Linked Sections)*

1. Scroll down the School Setup screen to the section for Other Info.
2. Click the drop down for Scheduling Options, and choose the blank option at the top.
3. Click Save at the top of your screen.
How to Begin the Linked Sections Process

You will begin the scheduling process by creating sections for all HR teachers, at every grade level. (If needed, see instructions for ADDING and DUPLICATING SECTIONS in this user guide).

You will create the Homeroom sections, and Core Subject sections using ONLY GENERAL EDUCATION (XX.0) course numbers for the following courses:

- Health
- Reading
- Language Arts
- Social Studies
- Math
- Science

For example, if you have four 5th grade HR teachers, you will create a total of seven sections for each of those 5th grade teachers (HR and the six courses listed above).

Tips:

- Use your list of staff assignments to determine and keep track of how many HR teachers you have at each grade level.
- The HR teacher is the teacher of record (Staff Name) on every one of the seven sections you create.
- Homeroom sections must be designated as Period 1.
- Use the ES Master Course List for the school year you are scheduling. The master course list can be found on the Synergy > Help > CCSD-ES > Scheduling > ES Master Course List.

Excluding Sections from the Link Section Process

If you have created any additional sections for the HR teacher with course numbers other than General Ed XX.0 (XX.1, XX.9, XX.8, etc.), you MUST check the box on each of those sections to Exclude From Linked Section Process. Otherwise, all students added to the homeroom section will also be scheduled into these sections.

- Review your MST402 Report for your teachers PRIOR to adding the General Education students to homerooms to ensure that you do not have any sections that must be excluded from the linked sections process.
- Each section has to be checked individually and Saved.
- When Linked Sections is selected in School Setup, the Exclude From Link Section Process check box displays on the Section screen. If checked, the section WILL NOT be automatically added to a student’s schedule when the homeroom section is added.
Create Sections for Specials Teachers (Art, Music, and PE)

Once you have created the Homeroom and Core Subject sections for all HR teachers, at every grade level, you will then create sections for your Specials Teachers.

For example, if you have four 5th grade gen ed HR teachers, you will create a total of four sections for each Specials Class (PE, Art, and Music), using the appropriate 5th grade course numbers.

**Important:**

- Use your list of staff assignments to keep track of how many HR teachers you have at each grade level, so that you know how many of each specials sections you need to create.
- The SPECIALS TEACHER is the teacher of record (Staff Name) on the specials sections.
- The HR teacher must be designated as the LINKED STAFF NAME on the specials section you create. (Names can be edited, if needed, directly in the Linked Staff Name field.)
- For example, on each of your four 5th grade PE sections, you will have a different 5th grade homeroom teachers designated with the LINKED STAFF NAME.

**Note:** The Linked Staff Name field only displays on the Section screen when the Linked Sections option is added on the School Setup screen.

**How to Clear a Name from the Linked Staff Field on a Section**

If a different teacher needs to be added, simply enter the next name, select it, and then save.

If the field needs to be completely cleared: Click the chain icon next to the linked staff teacher’s name. Click the Advanced link.
When the Find: Staff screen displays, click the red button to **Clear Selection**.

The Find: Staff screen will close and the linked teacher’s name no longer displays in the field. Click **Save**.

**Scheduling General Education Students in Homeroom Using Linked Sections**

- The Linked Sections option must be selected on the School Setup screen.
- **Linked Sections Reminder**: Adding students into the homeroom class will schedule the students in all of the sections where the same HR teacher is listed as the teacher of record. In addition, the students will be added to the specials classes where the HR teacher has been added as a **Linked Staff**.
- If teachers have non-General Education core classes (EIP, Special Ed, Gifted), review the sections to confirm they have been checked to **Exclude from Linked Section Process**.
- Using the class list for each HR teacher, identify which students are to receive **only 100% GENERAL EDUCATION** schedules.
- Any student that receives a subject course number **other than** XX.0 (EIP, Special Ed, or Gifted) should **NOT** be included with this list of students to be added to the HR at this time, using the LINKED SECTION method.

1. Using the class list for HR teachers, go to the teacher’s HR section screen and add the students. Click the Chooser button located in the Students area of the section screen.

2. Follow the directions provided in this guide to add students by name, grade level, or CCSD ID.
3. **NOTE:** When adding students to a section before the school year begins, the students’ Enter Date in the class will default to the first day of school. If, however, you are adding students after the school year has started, the Enter Date will default to the current date. **Review the enter dates** to ensure the appropriate Enter Dates are edited as needed for each student. The date can be updated, if needed, on the HR section before saving.

*As long as the steps for the Linked Section Process were followed, once you have successfully added your 100% GENERAL ED students to the teacher’s HR section, you will have ALSO completely scheduled those students in ALL of their GENERAL ED Core Subject course sections AND in the appropriate LINKED SECTIONS for PE, Art, and Music.*

**Scheduling Students for Special Services (Non-General Education Courses)**

After scheduling all General Education students in the school, it is recommended to remove the Linked Section option from the School Setup screen.

Students who receive special services such as EIP, Special Ed., and/or Gifted need to be carefully placed in the appropriate sections with course numbers specific to their needs. Since the Linked Sections process is disabled, every section will need to be individually added to students’ schedules.

- Follow the steps in this document that explain how to schedule students into the various service models.
- Schedulers can use the Section screen to add several students to a section at one time. Otherwise, use the Student screen > Classes tab to schedule an individual student into multiple sections.

**Using Linked Sections to Schedule General Education Students Individually**

**Tip:** *Use the steps below anytime during the year as new students enroll at your school.*

- The Linked Sections option must be selected on the School Setup screen.

The Linked Sections process will work when scheduling students individually using the Student Screen > Classes Tab.

1. Follow the directions provided in this guide to schedule a single student.
2. Add the student to the teacher’s homeroom section only using the Chooser screen to select the class.
3. Review the Enter Date on the homeroom section and edit as needed.
4. Click Save.
5. If the steps for the Linked Sections Process were followed, the student will be successfully scheduled in the homeroom class along with all General Ed core classes, and all specials classes.
How to Remove All Classes from a Student’s Schedule – Using Linked Sections

Tip: When scheduling students for the next school year, or if a scheduling error occurred ‘today,’ all classes can easily be removed from a student’s schedule when using Linked Sections.

- Go to the Homeroom Section screen and remove the student from only the homeroom class. This removes all the classes for that particular student so they can be scheduled correctly.

IMPORTANT: If the school year has started and the student spent time with the original teacher, a leave date (the last day the student was in the teacher’s class) must be added for the existing classes. Then, add the new classes effective the next school day.

OnTrack Reports to Assist With Linked Sections

Navigation: CCSD Portal > OnTrack > Reports > Schedules > select from the list below –

SSP4654 - Synergy Linked Staff Report: The report can be sorted by the Primary Teacher or the Linked Teacher. Use this report to view all sections where a linked teacher was added to the section.

SSP4666 - Linked Sections: Exclude From Link Section Process: The report displays an alphabetical list of all teachers, their sections, and if the section is excluded from the linked process. Use this report to identify non-General Education classes that were not excluded. Go to the section to exclude it to prevent potential scheduling errors.

Tip: Both of these reports can be run to review the next year’s setup during the spring as schedulers are creating sections in their next year focus.
Deleting a Section from a Teacher’s Schedule **BEFORE** the First Day of School

1. Navigation Menu: Schedule > Section
2. Enter Section ID for the Section your wish to delete and click Find.
3. If the students have **NOT** attended the class (no Seat Time), delete students from section by using the checkbox under the “X” column, then click Save.

4. Click the Additional Staff Tab to review if teachers have been added.
5. If there are teachers on the screen, they must be removed before the section can be deleted. Click the checkbox to the left of the teacher’s name, then click Save.
6. After all students, and additional staff have been removed from the section, click the Delete button at the top of the screen.

![Section](image)

7. A Confirm window will display. Click Yes to delete the entire section.

![Confirm](image)

**NOTE:** Dropped students will display on the **Student Enrollment History Tab**. If students have seat time in a section and appear on the Student Enrollment History, the section **cannot** be deleted. Please see the next section of this user guide.

*If you need assistance determining when a student can be deleted from a class or if a section can be deleted, please reach out to the Student Reporting Team or Synergy Team for support and guidance.*
**IMPORTANT: Deleting Students from a Teacher’s Section AFTER the First Day of School (Closing a Section)**

If you want to delete a section from a teacher’s schedule AFTER the first day of school (Seat Time has been associated with the class), you must enter a leave dates for each student in the Section.

*If you need assistance determining when (or if) a student can be deleted from a class, please reach out to the Student Reporting Team or Synergy Team for support and guidance.*

To enter Leave Dates for multiple students, use the calendar icon to enter a Leave Date for first student, highlight it and then Copy (CTL+C)/Paste (CTL+V) the Leave Date to all other students.

1. Click Save.
   
The Section itself cannot be completely deleted as there is history attached to it.

**NOTE:** To go back and delete a Leave Date once you have saved it, highlight the date with your mouse and use the Delete key. Save.

If students do not display on the Current Students Tab, click the Student Enrollment History Tab to see the list of students.
Scheduling a Single Student

1. From the Navigation Menu: Schedule > Student
2. Enter name or CCSD ID to find student.
3. Click on Classes Tab.

Add a single class to a student's schedule

1. Click on Chooser.

2. If you know the four-digit section number for the class you want to add, type the Section ID number (use leading zeros) and press Enter or click the Find button. Refer to the MST402 Report (Section List by Teacher) to find Section ID numbers.

   Tip: You can also search by the teacher’s name or room number. Enter criteria and press Enter or click the Find button.

3. If the Section ID was used, the class is automatically added to the Selected Items list (right side of the screen).
4. If the name or room number was used, click on the row for the section needed to move it to the Selected Items side of the screen.
5. Click the Select button at the top of the screen.
6. The new section is added to the student’s schedule. Adjust the Enter Date as needed for the class.
7. Click the Save button.

Add multiple classes to a student’s schedule

1. With the desired student selected, click on the Classes Tab. Click on Chooser.

2. Type the Teacher’s Last Name in the box and press Enter or click the Find button. The Search Results will list all sections for that teacher.
3. Click on the rows for the correct classes to move the sections to the Selected Items column on the right side of the screen. Review classes to select by course number.
4. If ALL sections for the teacher are needed, click the Add All Rows button, moving all the classes in the list to the Selected Items column on the right side of the screen.

5. Once all Sections have been added to the Selected Items column on the right side of the screen, click the Select button at the top of this screen. This will add the selected sections to the student’s schedule.

6. The enter date will default to the first day of school when adding classes before school begins.

7. After school starts, the enter date will default to the current date. Be sure to review and change entry dates when necessary. Click SAVE.
Reactivating a Student

Reactivating a Student Before the School Year Begins

1. From the Navigation Menu: Schedule > Student > Enrollment History Tab.
2. Click on the **Enter** date for the desired school year.

3. An Enrollment History screen will open.
4. Highlight the leave date and use delete key on keyboard to empty the field.
5. Click on the drop down box in the Leave code field and choose the empty line at the top.

6. When Leave date and Leave Code are gone, Click on **Save**.
7. The student will be active again.
Reactivating a Student During the School Year

1. From the Navigation Menu: Schedule > Student
2. Find the student (if you cannot find the student – check your focus to be sure it is set to “Show Active and Inactive.”)
3. Note: The names of Inactivated Students are in parentheses.
4. Click on the Menu.
5. Click on “Activate Student.”
6. The Activate Student screen opens.

7. Enter the Date of re-enrollment, Enter Code = E2 (Re-enter), Current Grade, and FTE=1.00.
8. Click on Activate and the student will be active again (parentheses have been removed).
Changing a Student’s Schedule BEFORE the First Day of School

**NOTE:** If you are working on ‘Next Year’ schedules, your screen will be brown.

1. Navigation Menu: Schedule > Student
2. Enter name or CCSD ID to find the student.
3. Click on Classes tab

To add a new section to a student’s schedule:

4. Click on Chooser. The Chooser screen will open.

5. If you know the **four-digit** section number for the class you want to add, type the **Section ID number** (use leading zeros) and press the **Enter key** or the **Find button**. Refer to the MST402 Report (Section List by Teacher) to find Section ID numbers.
   a. You can also search by the teacher’s name or room number.

6. Click on the row, for the section needed, to move it to the **Selected Items** side of the screen.
7. If an incorrect section appears as a Selected Item, click the box under the ‘X’ column to remove it from the right side of the screen.

8. After adding all the needed sections to the Selected Items side of the screen, click the green Select button at the top of the screen.

9. The new sections have been added to the student’s schedule.
10. The Enter Date will default to the first day of school, as long as the school year has not started.
11. If you are replacing one or more sections with the newly added ones, check the “delete” box to the left of the sections you wish to replace, and click Save.

**IMPORTANT NOTE:** Be sure to follow steps, beginning on the next page, to add leave dates if the school year has already started.
IMPORTANT: Changing a Student Schedule AFTER the First day of School

If you are changing a section on a student’s schedule AFTER the first day of school, you cannot just delete the line for the class. You must record a leave date on the student’s schedule. Click on the calendar icon in the Leave Date column, choose the appropriate Leave Date and Save.

Note: The leave date recorded, for the class, should be the last day the student was active in the section.

To enter Leave Dates for multiple sections enter a Leave Date for one section, highlight it and then Copy (CTL+C)/Paste (CTL+V) to all applicable classes.

NOTE: To go back and remove a Leave Date once you have saved it, highlight the date with your mouse and use the Delete key. Save.
Scheduling Students in Homeroom Using Assign Students to Sections Screen

1. From the Navigation Menu: Schedule > Assign Students to Sections
2. Click “By Student” Tab.
3. Enter the Section ID you want to add the students to by entering the section number or using the link icon to find the number.
   Refer to the MST402 Report (Section List by Teacher) to find Section ID numbers.
4. After selecting the section ID, the fields for the course number and title, and the teacher’s name will populate.
5. Click the Chooser button to select students.

When the Chooser screen opens:
6. Enter the students from the HR Roster using the CCSD ID, or if not known, use the students’ Last Names.
   a. You can narrow the list by selecting the desired grade and gender, and then click the Find button at the top of the screen.
7. Click the row that contains the name of student(s) to add to the class.
8. Click the Select button at the top of the screen when all known students’ names are in the Selected Items list (right side of the screen.)

The Chooser screen will close and return you to the Assign Students to Sections screen.
9. Use the calendar icon to enter Start Date (First Day of School).
10. Click on “Process.”

11. You will receive a message with total number of students added to the Section. You can also go to the Section to confirm that the students are there.
Verifying Homerooms Using the Class Assignment Screen

The steps below provide a quick way to see which students are missing a homeroom and easily schedule them into one all on a single screen in Synergy.

*Note: In order for this process to work effectively, all homeroom sections must be created first.*

In Quick Launch, type Class Assignment.

- On the Class Assignment screen, the left window shows students.
- The right window shows homeroom teachers' sections.

- You can filter by a particular grade by clicking the Grade Level filter boxes.
- Otherwise, you will see all grades levels.

- By checking the box *Unassigned Only* in the left window, and then clicking the Filter Students button, you will see a list of all students who have not been assigned to a homeroom class.
- To add students to a homeroom, check the box for the appropriate grade level.
- Make sure that *Unassigned Only* is checked.
- Click *Filter Students.*
After the filters are set and only students not assigned to a homeroom class display in the left window, follow the steps below.

- In the window on the right, the homeroom teachers’ sections can be viewed.
- Set the Teacher Filters for the appropriate grade level and click Filter Sections.
- Teachers with Homerooms for that grade will appear with a white box under the Grade.
- Teachers with a grayed out box do not have a homeroom in that grade level.

- Check **Add** next to students in the left window that you wish to add to a particular teacher’s homeroom.
- Once you have selected all of the students, click **Add** next to the appropriate teacher.

Teachers’ class totals will update and those students will no longer appear in the *Unassigned* list in the left window.
Assign Students to Sections - Copying Students from One Section to Another

NOTE: Use if you have created ALL sections for a teacher’s Master Schedule, and you wish to copy their students from Homeroom to the rest of their schedule.

1. From the Navigation Menu: Schedule > Assign Students to Sections

2. Click on the tab “By Section.”
3. In the Student Action drop down, choose “Copy (Copies students from section to section.)”
4. Use the calendar icon to enter the Date to enroll students as of the first day of school (if you are copying before school starts, it will default to the first day, regardless of what date you are processing. If you are processing after school starts, be sure to enter the correct date).
5. Check the box to “Use Section Pattern Match.”
6. Enter the section you want to copy from in the “From Section Pattern” field.
7. Enter the section you want the students copied to in the “To Section Pattern.”
8. After checking to be sure you have the right options entered, click on “Process.”
9. A Job Results screen will display. Click on Line 2 icon to confirm the number of students processed.
10. You can also go to the section that was in the “To Section Pattern” field to confirm all the students are there.
Using the Assign Additional Staff Screen

In the Quick Launch box, type Assign Additional Staff.

Enter or Select the following areas of the screen. Refer to the screen shot below for corresponding numbered steps:

1. In the area identified as number 1, click the chain icon in the Staff Name to search and add the teacher’s name listed as the primary teacher of record.
   a. When the primary teacher’s name is added, all associated sections display on the right side of the screen under the Select Sections Assignments area, described on the next page.
2. Enter the Start Date for the additional staff.
3. Keep the End Date fields empty.
   a. If the additional staff needs an end date, in the case of a Supply Teacher or if a teacher is no longer providing services for a class, the leave dates will be added individually on the section screen, Additional Staff Tab AFTER the supply position or service ends.
4. In the Select Additional Staff area, click the chain icon in the Staff Name to search and add the teacher’s name that you want to add as additional staff.
5. In the Select Additional Staff Attributes area, select Class Role, TVUE Attendance, TVUE Grades, TVUE Grade Book, and Staff Responsibility.
   • Add the appropriate security needed in the Attendance, TVUE Attendance, TVUE Grades, TVUE Grade Book areas.
   • Be sure to check the box to Exclude from State Reporting for supply teachers or other situations when that needs to be selected.

Continued on the next page.
The example at right shows how the fields may look when selections are made.

6. Check the boxes for all sections where the additional staff teacher needs to be added.
7. When all selections are in place, click the button **Assign Additional Staff**.

8. When the additional staff is added, a message will display. Click OK to close the message.
Combining Elementary Sections into One Main Class (Optional)

For best results, schedulers should complete the process to combine sections **BEFORE** teachers begin working in the gradebook; thus, avoiding loss of students’ grades. Be sure to read the Combined Sections chapter completely to understand the process and to review the scheduling scenarios.

Please work with administrators and teachers at your school to determine if the classes at your location should be combined. Combining sections into one main class is optional, and some teachers may prefer to leave the sections as they are so they display separately in the gradebook.

The field to designate the Grade Book Main Class is located on the Section screen.

Using the **Grade Book Main Class** dropdown, schedulers can combine sections, **of the same subject, period, and teacher**, so the classes display as one roster (per subject) in the gradebook.

The **Combined Sections Report SSP4663**, available in OnTrack > Reports > Schedules, lists all of the combined sections at your school.

- For a section to appear in the dropdown menu, it must to be **Included in Grading**, have the same primary staff teacher, and cannot be tied to any other Grade Book Main Class.
- For consistency, in most cases, the **Grade Book Main Class** should be the General Ed., XX.0 class, for the subject.
- **Refer to the MST402 Section List by Teacher**, to determine the Grade Book Main Class section for each subject in the teacher’s schedule.

On the section screen for a non-General Ed class, look for the **Grade Book Main Class** drop down located in the Grade Book Specialists area of the screen and choose the General Ed. XX.0 section (for the same subject) as the Grade Book Main Class.

In the EIP Reduced Class example below, the EIP Science section can be combined with the teacher’s General Education Science section.

- Click the Grade Book Main Class dropdown to display all sections currently scheduled with the primary staff teacher.
- Select the General Education Science section, (0130) for the Grade Book Main Class.
- Click Save.
Before and After Gradebook Examples

The screen shot below displays an example of a teacher’s gradebook before any sections are combined. Note that the teacher has multiple sections of the same subject: Gen Ed, Special Ed. Co-Taught, & EIP.

After completing the combining process, only one section for each subject displays in the teacher’s gradebook (see below). Even though students are scheduled in the different sections with the appropriate course numbers, the teacher only needs to enter assignments and grades into one gradebook per subject.

- When transcript grades are posted at the end of the year, they will be associated with the students’ actual scheduled course numbers. Likewise, grades will appear in PVUE and SVUE for the students’ actual scheduled classes.

Please review the steps on the next page if your school uses departmentalization.
Steps for Departmentalized Schedules:
The screen shot below uses different colored highlighting to explain the process to select the gradebook main class and which sections to combine for the teacher. For best results, view this PDF on the screen so the different colors are visible. If possible, print this guide in color.

- **Ms. Smith & Ms. Baker are a team at a departmentalized school.**
- **Ms. Smith teaches Language Arts and Reading.**
- **Ms. Baker teaches Math, Science, and Social Studies.**
- **Both teachers have General Ed. and EIP students in their classes.**
- **Ms. Baker also has Special Ed. co-taught students in her class.**

1. Review the MST402, Section List by Teacher to determine which General Ed sections contain students from each of the homeroom classes.
   - In the MST402 example below, review Ms. Smith’s sections.
   - Combine section 0600 with **0092 as the main class**. The students in both of these sections are in Ms. Smith’s homeroom class.
   - Combine section 0718 with **0105 as the main class**. The students in both of these sections are in Ms. Smith’s homeroom class.
   - Combine sections 0716 and 0613 with **0034 as the main class**. The students in these three sections are in Ms. Baker’s homeroom class.
   - Combine sections 0606 and 0611 with **0096 as the main class**. The students in these three sections are in Ms. Baker’s homeroom class.

![Staff Name | Term | Per | Sect ID | Course ID And Title](image)

- **Ms. Smith’s HR**
  - 3 | 0092 | 23.00600000 - Language Arts 5
  - 3 | 0600 | 23.10600000 - EIP Language Arts 5
  - 3 | 0716 | 23.10600000 - EIP Language Arts 5
  - 3 | 0613 | 23.90600000 - Language Arts 5

- **Ms. Baker’s HR**
  - 3 | 0034 | 23.00600000 - Language Arts 5
  - 5 | 0718 | 23.10700000 - EIP Reading 5

- **Ms. Smith’s HR**
  - 5 | 0105 | 23.00170000 - Reading 5
  - 5 | 0606 | 23.10170000 - EIP Reading 5

- **Ms. Baker’s HR**
  - 5 | 0096 | 23.00170000 - Reading 5
  - 5 | 0611 | 23.90170000 - Reading 5

2. After the sections are combined and the gradebook synchronization runs, Ms. Smith’s gradebook will only display sections: 0019, 0092, 0034, 0105, and 0096.

*Please review the example scenarios on the next page.*
Combined Gradebook Sections Scenarios:

1. Student has been enrolled in the Gradebook Main class (.0). The teacher has entered grades for this student in this .0 section. The student is then moved from the .0 section to another section that has been combined with the .0 section (.9, .1, .2, etc.).
   - If the student was leaved dated from the .0 class (mid-term IEP change or became Gifted eligible), this change will be transparent to the teacher. The student will remain visible in the .0 gradebook main section with all previously entered grades.
   - If the student was moved because he/she should have been in the other section all along, he will be deleted from .0 class. The student will remain visible in the .0 gradebook main section with all previously entered grades.
   - If a new section needs to be added after the teacher already has grades in the gradebook, the scheduler should create the new section and combine it with the .0 section.
     o Do not add students to the section yet. Wait for the regular gradebook synchronization (that occurs Mon-Fri morning at 4:00 AM) or request that a Synergy team member do a manual synchronization for your school.
     o After a sync, students can be added to the new section. Existing assignment grades should remain visible in the gradebook.

2. A teacher has two sections in a period that have NOT yet been combined into one gradebook main class. The teacher has entered assignments and grades for the students into BOTH sections. At a later date, the sections are combined.
   - The teacher in this case MUST FIRST print the gradebook for the section that will be combined into the gradebook main class. Once the classes are combined, the teacher will no longer see or have access to the original section in the gradebook. The grades are effectively gone.
   - The teacher will then use the gradebook printout to re-enter the grades for the students from the original section that is now combined into the gradebook main section.

3. A brand new section has been added for a teacher after the gradebook sections have been initially combined. This new section is marked to be combined with the existing gradebook main class for that period. This new section has student(s) that are newly enrolled with this teacher and have no previous grades. The students will be visible in the gradebook main class moving forward with no problem.
III. Creating Schedules for the Next School Year

Each year, around Spring Break, schools begin preparing for the next school year. In order to begin working on the Master Schedule for the next school year, you should gather all known information, which at a minimum should be teacher assignments by grade level. In addition, administrators and teachers will determine the classroom models to be used the following year. For example, Special Ed co-taught model, EIP Reduced Class model, EIP Push-In or EIP Pull Out, Gifted Cluster model, etc.

- Your scheduling strategy will take one of two paths:
  1. You will begin creating your master schedule from scratch.
  2. Your AP will submit a request that your current year’s schedule be copied into your next year’s focus. This request is made to Information Systems in Technology Services.

Note: If a new scheduler has never created a master schedule from scratch, it is recommended that this path is used. Creating a schedule from the beginning provides schedulers a better understanding of the entire process.

Creating Next Year’s Sections from Scratch:

**IMPORTANT:** Change your Synergy focus to the next school year, so that you will be working on a BROWN screen.

1. Using your teacher assignments (Staff List), you will use the Section screen and the Add and Duplicate functions to create your master schedule.
   - Use this document along with the master course list to add the first, new section. Then continue building sections using the duplicate process.
   - Edit each new (duplicated) section for new courses, periods, teachers, etc.

2. **Run the MST402 (by teacher) and MST403 (by course) reports as often as necessary to confirm/check your work against your teacher assignments by grade level, and to make any necessary corrections.**

3. If new teachers are hired for the next year, they can be added to CSIS Staff Maintenance with the appropriate (future) start date. This enables them to be added to Synergy so they can be assigned sections.
   - Ask the Synergy Team for help – new teachers will not automatically roll into ‘next year.’
   - Use ‘Term, Short’ as a Staff placeholder, if desired.

   - **Note:** Using ‘Term, Short’ for numerous vacant positions can be very confusing. If scheduling for next year starts before all teachers are hired, it may be best to hold off creating sections for new teachers until they can be added into CSIS Staff Maintenance and then into Synergy.

4. If you are going to use the **Linked Process**, follow the directions provided in the document.
   - You can add the homeroom teachers, as Linked Staff, to the specials sections (Art, Music, & PE) when those sections are created.
   - **VERY IMPORTANT:** Be sure to EXCLUDE appropriate sections, from the linked process, as described in this document.

5. If your school is going to combine teachers’ gradebook sections, the process can be done before students are added. Therefore, when classroom models are determined and the sections are created, follow the steps in this document to combine sections of the same subject, period, & teacher, into one main gradebook class.

When the master schedule is complete for all teachers, or as complete with the information known before the end of the current school year, follow the steps listed below in: **Once the Master Schedule for the next school year has been entered into Synergy and confirmed as correct.**

**Helpful reports are available in OnTrack > Reports > Schedules: for Linked Staff & Combined Sections.**

**Tip:** Run the two linked staff reports for the ‘next school year’ to review data.
Creating Next Year’s Sections Using a Copy of the Current Year:

**IMPORTANT:** Change your Synergy focus to the next school year, so that you will be working on a BROWN screen.

1. You will begin by running the MST402 and MST403 reports to review the sections that were copied into your next year’s focus. Then, using your teacher assignments (Staff List), you will edit or clean-up the master schedule for next year on the Section screen.
   a. Review the course numbers carefully to be sure the correct ones for the next school year are on the section. Edit the course numbers as needed.
   b. **Review all Delivery Models on sections**, where they are required, to ensure accuracy.

2. Run the MST402 (by teacher) and MST403 (by course) reports as often as necessary to confirm/check your work against your teacher assignments by grade level, and to make any necessary corrections.

3. **Teacher Changes:**
   - If teachers are leaving the school and being replaced, leave the old teacher’s name on the sections until the new teacher can be added. Once the new teacher is hired, add them to CSIS Staff Maintenance, with the appropriate (future) start date.
   - Ask the Synergy Team for help – new teachers will not automatically roll into ‘next year.’
   - Edit sections as needed to add new teachers.
   - **Pre-Planning Deadline for correct Staff Names - Use ‘Term, Short’ as a placeholder when needed.**

   Before school begins, review all sections at your school using the Synergy Report - MST402. Ensure that all of the sections listed for the teachers are the correct grade levels and/or courses that they teach.
   - **NOTE:** **Staff Names must be updated and corrected by pre-planning so that teachers are current/correct on the first day of school.**
   - **Do not leave a teacher’s name on sections if they are no longer at your school.**
   - **Do not leave a teacher’s name on sections that are no longer needed or for a different grade level or subject than what the teacher is going to teach the next year.**

4. Be sure to change room numbers on all sections when you have teacher changes, or if a teacher has physically moved to a new room.

5. Please be aware that Additional Staff, Linked Sections, and Combined Sections pieces of the Section screen do **NOT** copy to the next year’s sections. These steps will need to be done on the sections in the new year.

6. If you are going to use the **Linked Process**, run the MST403 and review the specials sections (Art, Music, & PE).
   a. Each homeroom teacher will be linked to one of each specials: Art, Music, & PE.
   b. **VERY IMPORTANT:** Be sure to **EXCLUDE appropriate sections**, from the linked process, as described in this document.

7. If your school is going to combine teachers’ gradebook sections, the process can be done before students are added. Therefore, when classroom models are determined and the sections are created, follow the steps in this document to combine sections of the same subject, period, & teacher, into one main gradebook class.

8. Helpful reports are available in **OnTrack > Reports > Schedules: for Linked Staff & Combined Sections.**
   - **Tips:** Run the two linked staff reports for the current year to help set up the sections in the new year. **Run the two linked staff reports for the ‘next school year’ to review data.**
Once the Master Schedule for the next school year has been entered into Synergy and confirmed as correct:

1. You will need to obtain a list of students by homeroom.

2. If you not using the Linked Sections process, you will add students to the homeroom sections and then copy them to the other subjects using the Assign Students to Sections function. Directions are included in this document.
   a. If the students receiving services are copied into the General Ed core subject sections, carefully review each students’ Student Screen > Classes Tab to delete the incorrect classes and add appropriate sections for EIP, Gifted, Special Ed, and/or ESOL.

3. If using Linked Sections begin adding General Ed students to homeroom sections only and save. This will fully schedule all General Ed students into core classes and specials (Art, Music, & PE).
   a. **Tip:** Schedule one student in the homeroom section class and save. Review the student’s schedule to ensure that all General Ed core classes and specials were added. Make any needed updates to the teacher’s sections, and then continue adding the rest of the General Ed students into the homeroom class.

4. After all General Ed students are complete, the students receiving services will need to be carefully scheduled.
   a. One option is to disable the Linked Sections process on the School Setup screen. Then, proceed scheduling the remainder of the students individually (on the Student Screen > Classes Tab) or on the section screens. Remember to add the specials classes (Art, Music, & PE).
   b. Another option is to keep the Linked Sections process enabled, and continue to schedule the students receiving services individually on the Student Screen > Classes Tab.
      i. Schedule students in their homeroom section & save. Then, delete the incorrect General Ed classes and add the appropriate sections for EIP, Gifted, &/or Special Ed.
      ii. Carefully review every students’ Student Screen > Classes Tab to ensure they were added to the appropriate course numbers needed for their services.

5. Tip: Use directions in this document to print students’ schedules for review and approval.
IV. Guidelines for Scheduling Student Services

Gifted Scheduling

**Gifted students must have a CSIS Services Screen.**

For any newly identified gifted student, create a CSIS service screen that shows the Gifted eligibility date and the begin date.

**ONLY Gifted students should be scheduled with (XX.2) course numbers, according to the appropriate classroom model below. If you have questions, regarding Gifted models that are not addressed below, administrators can contact Sarah Kessel, Supervisor of Advanced Learning Programs: Sarah.Kessel@cobbk12.org.**

A. Gifted Resource Model

- All Gifted students should be scheduled with the appropriate (Target Class) Gifted Resource (71.2X) course number, in addition to their General Ed classes AND/OR Advanced Content class(es).
- **Suggestion: Use 11th Period for the Gifted Target Classes.**
- The Gifted endorsed teacher (Target Teacher) will be the teacher of record.
- The Gifted Target section should be Excluded from Grading.
- Use the Gifted Delivery Model drop down menu on the section to choose 101-Resource.

B. Gifted Cluster Model

- Cluster Model and Collaborative Model use the same course numbers, but the delivery models will be different.
- A Gifted Cluster teacher, who is Gifted Endorsed, may have multiple sections for LA, Reading, SS, Science, and/or Math. (Course numbers may consist of General Education, EIP, and/or Special Ed. course numbers in addition to the Gifted XX.2 course numbers.)
- The Target teacher does not need to be added as additional staff on the Gifted Cluster sections.
- Gifted students will be scheduled with the appropriate Gifted (XX.2) course numbers instead of the General Ed core classes for the subject areas they are receiving Gifted Cluster Model services.
- Each teacher serves 5-8 students per section (optimal size, as recommended by the Ga DOE.) A school may opt to serve up to 49% of a total class in the Cluster group model for instructional and FTE purposes.
- Each student has a maximum of 2 Cluster subjects (sections) in their schedule.
- Cluster subject areas should be determined for scheduling purposes based on student strength and data.

- On the (XX.2) section, code the appropriate Gifted Delivery Model using the drop down menu to choose the correct Cluster for the subject area.
C. **Gifted Collaborative Model (Note: Additional Staff Required)**

- Cluster Model and Collaborative Model use the same course numbers for the gifted students, but the delivery models will be different.
- A Gifted Collaborative teacher, who is the **General Education teacher**, may have multiple sections for LA, Reading, SS, Science, and/or Math. (Course numbers may consist of General Education, EIP, and/or Special Ed. course numbers in addition to the Gifted XX.2 course number.)
- The Target teacher, or other Gifted-Endorsed teacher collaborating with the General Ed teacher, needs to be added as additional staff on all of the Gifted Collaborative sections.
- **Gifted students** will be scheduled in the appropriate (XX.2) course number instead of the General Education core class for the subject area they are receiving Gifted Collaborative services.
- Each teacher has a **maximum of 8 students** per Collaborative section.
- Each student has a **maximum of 1 Collaborative subject (section)** in their schedule.
- Collaborative subject area should be determined for scheduling purposes based on student strength and data.

- On the (XX.2) section, code the appropriate **Gifted Delivery Model** using the drop down menu to choose the correct **Collaborative** for the subject area.

D. **Advanced Content Model - 4th and 5th Grade (Language Arts, Reading, &/or Math)**

*Directions differ depending if the teacher is gifted endorsed or not.*

- **If the Advanced Content teacher IS gifted endorsed –**
  - **Gifted students** will be scheduled in the appropriate Advanced Content (23.2) or (27.2) course number instead of the General Education core classes for the subject areas they are receiving Advanced Content services.
  - On the (23.2) or (27.2) gifted sections, code the appropriate **Gifted Delivery Model** using the drop down menu to choose the correct **Advanced Content** for the subject area.

- **If the Advanced Content teacher is NOT gifted endorsed –**
  - **ALL students receiving Advanced Content from a teacher who is not gifted endorsed,** will be scheduled in the **General Education Advanced Content course numbers (XX.0)** instead of the regular General Education or Gifted core classes for the subject areas they are receiving Advanced Content services.
  - **Do not code a gifted delivery model if the teacher is NOT gifted endorsed.**

*Continued on the next page.*
An Advanced Content teacher may have multiple sections for LA, Reading, and/or Math. (Course numbers may consist of General Education, EIP, and/or Special Ed. course numbers in addition to the Gifted XX.2 course numbers if he or she is gifted endorsed.)

Advanced Content Reading/Language Arts is a two-segment course. Students scheduled for Advanced Reading should also be scheduled for Advanced Language Arts.

General Education (non-gifted) students receiving Advanced Content will be scheduled in the General Education Advanced Content course numbers (XX.0) instead of the regular General Education core classes for the subject areas they are receiving Advanced Content services.

The Advanced Content General Education sections will NOT be coded with a Delivery Model.

Gifted Students and General Education students who are NOT receiving Advanced Content services will be scheduled in the General Education course numbers (XX.0).

The Advanced Content teacher should be the teacher of record.
**EIP students must have a CSIS Services Screen.**
Create a CSIS service screen that shows the Service Eligibility Date and the Service Begin Date.

**ONLY EIP students should be scheduled with (XX.1) course numbers. If you have questions, regarding EIP models that are not addressed below, administrators can contact Kaci Berry, Personalized Learning Consultant: Kaci.Berry@cobbk12.org.**

If an EIP model changes during the school year, for example an EIP Self-Contained Class changes to an EIP Reduced Class due to increased class size, all students must be leave dated on the original classes. Then, create new EIP sections, showing the new delivery model, with the appropriate enter date for the students and teacher. In addition, the students’ CSIS Service screen needs to be edited to reflect the original model ending and the new model starting.

**A. EIP Self-Contained Class**
Students in this model generate six segments of EIP weight gaining the most funding available for EIP services.

- The **EIP Self-Contained** model refers to a classroom of students who are **all EIP**.
- The students should all be scheduled using the **EIP Self-Contained course numbers (XX.1)** for **ALL** the subjects shown below.
- The General Education teacher is the teacher of record.

<table>
<thead>
<tr>
<th>Health</th>
<th>Science</th>
</tr>
</thead>
<tbody>
<tr>
<td>Language Arts</td>
<td>Mathematics</td>
</tr>
<tr>
<td>Reading</td>
<td>Social Studies</td>
</tr>
</tbody>
</table>

- Use the **EIP Delivery Model** drop down menu to choose **2 - Self-Contained** delivery model for the **(XX.1) EIP** sections.

**B. EIP Reduced Class**
Students in this model generate six segments of EIP weight gaining the most funding available for EIP services.

- The EIP Reduced Class model is a combination of non-EIP students and EIP students in the same room.
- The General Education teacher is the teacher of record.
- The teacher will have a set of General Education (XX.0) sections AND a set of EIP Reduced Class (XX.1) sections for all subjects shown below.
- The General Education students will be scheduled in General Education course numbers (XX.0) for the subjects shown below.
- The EIP students will be scheduled using the EIP Reduced Class course numbers (XX.1) for **ALL** the subjects shown below.

<table>
<thead>
<tr>
<th>Health</th>
<th>Science</th>
</tr>
</thead>
<tbody>
<tr>
<td>Language Arts</td>
<td>Mathematics</td>
</tr>
<tr>
<td>Reading</td>
<td>Social Studies</td>
</tr>
</tbody>
</table>

Continued on the next page.
o EIP students who are in a Reduced Class will not have an EIP Push In Model as part of their schedule.

o Use the EIP Delivery Model drop down menu to choose 4—Reduced Class Model delivery model for the (XX.1) EIP sections.

C. Supplemental Instruction Intervention (When used with EIP Self-Contained or EIP Reduced Class)

These directions are specifically for EIP Self-Contained Class or Reduced Class size where Supplemental Instruction Intervention is also used. Important Note: Non- EIP students may receive supplemental instruction. If a student is NOT EIP, do not schedule the student in XX.1 (EIP) course numbers. See step ‘e’ below for additional scheduling information.

Example of Supplemental Instruction Intervention: READ 180/System 44 *Please consult with the Personalized Learning Department if there is a particular supplemental instruction intervention that you are implementing besides READ 180/System 44.

Teachers using this model could have more than one section of (XX.1) Reading.

o Schedule the EIP students receiving Supplemental Instruction in separate sections as students not receiving Supplemental Instruction.

o Please use the same EIP delivery model that is used in the classroom on any new section created. (Example: if the class is EIP Reduced Class Model, any new EIP Reading section, created for the purpose of READ 180/System 44 must also be coded with the EIP Reduced Class delivery model.)

Students scheduled for this model will only have ONE section of (XX.1) Reading.

o EIP Students, in this model, will have all .1 classes in their schedule.

o If the supplemental instruction is in Reading then their .1 section of Reading will have the homeroom teacher, or Gen Ed Reading teacher when departmentalizing, as the teacher of record.

a. Add the supplemental teacher as additional staff. (See directions below for adding additional staff.)

b. The Supplemental Instruction Intervention section should only contain students who are served by the Reading teacher and the READ 180/System 44 teacher.

c. The EIP Delivery Model should match the rest of the teacher’s classes as either “Self-Contained or Reduced Class” because this is their primary service model.

d. Students in Self-Contained or Reduced Class models generate six segments of EIP weight gaining the most funding available for EIP services.

e. General Ed students that are pulled for READ 180/System 44, should be scheduled in a General Ed Reading section with the Supplemental Teacher added as additional staff.

o Schedule the Gen Ed students receiving Supplemental Instruction in separate sections as students not receiving Supplemental Instruction.
D. EIP – Augmented/Push In

- Students should be scheduled using the EIP Push In course numbers (XX.1) for the appropriate subject of Math, Language Arts, Reading, or all three, depending on the services the student is receiving.
- The rest of the students’ schedule will be General Education (XX.0) courses.
- The EIP course (XX.1) replaces the General Education course in the student’s schedule.
- The teacher of record should be the Homeroom or subject-area teacher if departmentalizing.

Adding Additional Staff

- The EIP teacher should be added as additional staff on the Additional Staff Tab.
- The EIP section will only contain students who are served by both of these teachers.

- On the Additional Staff Tab, click “Chooser” to search for and add the additional staff member.
- Select the EIP Teacher under the Contributions heading, Responsibility drop down menu.
- The level of security access, for additional staff teachers, is decided by local school administration. The example of security shown below, allows access to update grades and manage gradebook assignments.

- Use the EIP Delivery Model drop down menu to choose 1 - Augmented/Push In delivery model for the (XX.1) EIP sections.
E. EIP – Pull Out:
- Students should be scheduled using the **EIP Pull Out** course numbers (XX.1) for the appropriate subject of **Math, Language Arts and/or Reading** depending on the services the student is receiving.
- **Schedule students for EIP Pull Out for no more than two segments.**
  - If more than two are needed, the third EIP segment can be Push In.
- The rest of the students’ core schedule will be General Education (XX.0) courses.
- The EIP course (XX.1) replaces the General Education course in the student’s schedule.
- The teacher of record should be the Homeroom or subject-area teacher if departmentalizing.

**Adding Additional Staff**
- The EIP teacher should be added as additional staff on the **Additional Staff Tab** *(follow directions above for adding additional staff.)*
- This EIP section will only contain students who are served by both of these teachers.

- On the **Additional Staff Tab**, click “Chooser” to search for and add the additional staff member.
- Select the **EIP Teacher** under the **Contributions** heading, **Responsibility** drop down menu.
- The level of security access, for additional staff teachers, is decided by local school administration. The example of security shown below, allows access to update grades and manage gradebook assignments.

- Use the **EIP Delivery Model** drop down menu to choose the **3 - Pull-Out** delivery model for the (XX.1) EIP sections.
Special Education Scheduling

**Special Education students are flagged for Goal View in CSIS.**

**ONLY Special Education students should be scheduled with (XX.8 or xx.9) course numbers.**

If you have questions, regarding Special Education models that are not addressed below, administrators can contact Teresa Vento, Supervisor in Specialized Services:

Teresa.Vento@cobbk12.org

Special Ed Delivery Models **NEW SY2019-20**

Code each Special Ed section with the appropriate Special Ed Delivery Model, and additional staff, *per your school’s SSA or Special Ed Lead.*

A. Special Education – Self-Contained Classes (i.e.: MOID, AU, BD, etc.)

- Special Education courses taught by a special education certified teacher in a self-contained classroom setting are scheduled with all (XX.8) course numbers.
  - **Exceptions:** Art, Music, and PE should be scheduled using the Gen Ed (XX.0) course numbers and appropriate homeroom or Specials teacher.

- Students, in a self-contained environment for the entire day, are scheduled in the Special Education Homeroom course number 00.0140000, regardless of their grade level.

- Schedule the content, subject-area classes, based on the grade level of the student.

- Refer to the *Courses by Grade* guide for specific (XX.8) course numbers for subjects below.

- **Schedule GAA 2.0 students in separate** Music, Art, and PE (XX.0) sections for testing purposes.

<table>
<thead>
<tr>
<th>Subjects Taught by Special Ed Teacher (X.8)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self-Contained Classes</td>
</tr>
<tr>
<td>2nd Period – Health</td>
</tr>
<tr>
<td>3rd Period – Language Arts</td>
</tr>
<tr>
<td>4th Period – Reading</td>
</tr>
<tr>
<td>5th Period – Science</td>
</tr>
<tr>
<td>6th Period – Mathematics</td>
</tr>
<tr>
<td>7th Period – Social Studies</td>
</tr>
</tbody>
</table>
B. Special Education – Pull Out/Small Group Classes

- Special Education courses taught by a Special Education certified teacher in a Pull Out setting are scheduled using the (XX.8) courses for the appropriate subject, depending on the services the student is receiving.
- The Special Education course replaces the General Education course in the student’s schedule.
- The teacher of record will be the Special Education certified teacher on the (XX.8) section.
  - Reminder: Students, in a Pull Out setting, are scheduled with a General Education Homeroom course number with the General Education teacher.
  - Health, PE, Art, and Music should be scheduled using the (XX.0) course numbers and appropriate homeroom or Specials teacher.
  - Refer to the Courses by Grade guide for specific (XX.8) course numbers for subjects below.

<table>
<thead>
<tr>
<th>Subjects Taught by Special Ed Teacher (X.8)</th>
<th>Pull Out/Small Group Classes</th>
</tr>
</thead>
<tbody>
<tr>
<td>2nd Period – Health</td>
<td></td>
</tr>
<tr>
<td>3rd Period – Language Arts</td>
<td></td>
</tr>
<tr>
<td>4th Period – Reading</td>
<td></td>
</tr>
<tr>
<td>5th Period – Science</td>
<td></td>
</tr>
<tr>
<td>6th Period – Mathematics</td>
<td></td>
</tr>
<tr>
<td>7th Period – Social Studies</td>
<td></td>
</tr>
</tbody>
</table>

C. Special Education – Collaborative/Co-Taught Classes

- Special Education courses taught by a General Education certified teacher in a Collaborative/Co-Taught setting are scheduled using the (XX.9) courses for the appropriate subject, depending on the services the student is receiving.
- The Special Education course replaces the General Education course in the student’s schedule.
- Refer to the Courses by Grade guide for specific (XX.9) course numbers for subjects below.

<table>
<thead>
<tr>
<th>Subjects Taught by Special Ed Teacher (X.9)</th>
<th>Collaborative/Co-Taught Classes</th>
</tr>
</thead>
<tbody>
<tr>
<td>2nd Period – Health</td>
<td></td>
</tr>
<tr>
<td>3rd Period – Language Arts</td>
<td></td>
</tr>
<tr>
<td>4th Period – Reading</td>
<td></td>
</tr>
<tr>
<td>5th Period – Science</td>
<td></td>
</tr>
<tr>
<td>6th Period – Mathematics</td>
<td></td>
</tr>
<tr>
<td>7th Period – Social Studies</td>
<td></td>
</tr>
</tbody>
</table>

- The teacher of record should be the General Education teacher on the (XX.9) section.
- The Special Education teacher should be added as additional staff on the Additional Staff Tab.

Continued on the next page.
**Adding Additional Staff**
- On the Additional Staff Tab, click “Chooser” to search for and add the additional staff member.
- Select Special Education Teacher under the Contributions heading, Responsibility drop down menu.
- The level of security access, for additional staff teachers, is decided by local school administration. The example of security shown below, allows access to update grades and manage gradebook assignments.

<table>
<thead>
<tr>
<th>Contributions</th>
<th>Teacher\VUE Security</th>
</tr>
</thead>
<tbody>
<tr>
<td>Responsibility</td>
<td>Amount</td>
</tr>
<tr>
<td>Special Education Teacher</td>
<td>None</td>
</tr>
</tbody>
</table>

**IMPORTANT STEP: Special Education – Collaborative/Co-Taught Classes:**
- The Special Education Co-Teacher must also be added as additional staff for any other section of the same subject that he/she co-teaches.
- This includes General Education (XX.0), EIP (XX.1), AND Gifted (XX.2) sections when applicable.
- Follow the directions above to add the additional staff, responsibility, and gradebook security if required, on the sections.

**D. GAA 2.0 – Georgia Alternative Assessment**
- Special Ed GAA 2.0 course numbers will be used for students identified, by the Special Ed Lead or SSA at your school, as being on the GAA 2.0 (Georgia Alternative Assessment).
- This means the student will not take the End of Grade/GA Milestone test at the end of the year.
- The GAA 2.0 course numbers may be used for students in 3rd, 4th, or 5th grades only, for the subject areas shown below.
- When required for a Special Ed student, the GAA 2.0 course number replaces the General Education or other Special Ed course in the student’s schedule for that subject.
- Please refer to the ES Course Numbers by Grade – Master Course list for the actual course numbers.

<table>
<thead>
<tr>
<th>Special Ed GAA 2.0 Grade Levels</th>
<th>GAA 2.0 Subjects</th>
</tr>
</thead>
</table>
| 3rd Grade                       | GAA 2.0 Language Arts  
GAA 2.0 Math |
| 4th Grade                       | GAA2.0 Language Arts  
GAA2.0 Math |
| 5th Grade                       | GAA 2.0 Language Arts  
GAA 2.0 Science  
GAA 2.0 Math  
GAA 2.0 Social Studies |
E. Special Education – Consultative Model Classes
   - Special Education classes taught as the Consultative Model will be scheduled using the General Education (XX.0) course numbers with the General Education teacher as the teacher of record.
   - Work with your school’s SSA or Special Ed Lead to determine additional staff &/or Delivery Models.
**ESOL Program Support Scheduling**

**EL students must have a CSIS Services Screen**

ESOL staff will create a CSIS service screen that shows the eligibility date, the begin date, the subject, and the model that the student is being served for ESOL. If you have questions, regarding ESOL models that are not addressed below, administrators can contact Dr. Mae Wlazlinski, Supervisor ESOL/Title III Program: Mae.Wlazlinski@cobbk12.org.

**NEW SY2019-20:** ESOL teachers no longer need sections with a 55.X course number.

- Elementary 55. X course numbers have been retired.
- Elementary students will not have an ESOL period as part of their schedules.
- ESOL Pull Out teachers are now added as additional staff on the subject-area section where the student receives the pull out service. Add the ESOL Pull Out Delivery Model to the section.

**A. ESOL Push In:**

- Follow the directions in this document for General Education, Gifted, EIP, and/or Special Education to determine the appropriate core subject course numbers, and to determine the teacher of record and additional staff based on the specific service area needed for the students.

- Use the ESOL Delivery Model drop down menu to choose, 2- Push-In delivery model for the core subject section where the student is receiving the ESOL Push In service.

- **NEW SY2019-20:** If ESOL Push In and ESOL Pull Out services are provided for different students in the same section, an additional second section must be created so both models can be reported.
  - Create the new section only if both Push In and Pull Out services are provided for different students in the same section.
    - Add the appropriate Delivery Model and additional staff on each section.
  - Contact the Synergy Team for assistance.

**Adding Additional Staff for ESOL Push In**

- On the subject-area section where the student is receiving ESOL Push In services, list the ESOL teacher as additional staff on the Additional Staff Tab. Even if another additional staff is listed such as EIP or Special Education, the ESOL teacher should be added.

- On the Additional Staff Tab, click “Chooser” to search for and add the additional staff member.

*Steps continued on the next page.*
o Select **ESOL Teacher** under the **Contributions** heading, **Responsibility** drop down menu.

o The level of security access, for additional staff teachers, is decided by local school administration. The example of security shown below, allows access to update grades and manage gradebook assignments.

<table>
<thead>
<tr>
<th>Contributions</th>
<th>TeacherVUE Security</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Responsibility</strong></td>
<td><strong>Amount</strong></td>
</tr>
<tr>
<td>ESOL Teacher</td>
<td>None</td>
</tr>
</tbody>
</table>

---

B. **ESOL Pull Out:**

- Follow the directions in this document for General Education, Gifted, EIP, and/or Special Education to determine the appropriate core subject course numbers, and to determine the teacher of record and additional staff based on the specific service area needed for the students.

- Use the **ESOL Delivery Model** drop down menu to choose, **1- Pull-Out** delivery model for the core subject section where the student is receiving the ESOL Pull Out service.

- **NEW SY2019-20:** If ESOL Push In and ESOL Pull Out services are provided for **different** students in the **same section**, an additional second section must be created so both models can be reported.

- Create the new section **only** if both Push In and Pull Out services are provided for **different** students in the **same section**.
  - Add the appropriate Delivery Model and additional staff on each section.

- **Contact the Synergy Team for assistance.**

**Adding Additional Staff for ESOL Pull Out: NEW SY2019-20**

- On the **subject-area section** where the student is receiving **ESOL Pull Out** services, list the ESOL teacher as additional staff on the **Additional Staff Tab**. Even if another additional staff is listed such as EIP or Special Education, the ESOL teacher should be added.

- On the **Additional Staff Tab**, click “**Chooser**” to search for and add the additional staff member.

*Steps continued on the next page.*
Select **ESOL Teacher** under the **Contributions** heading, **Responsibility** drop down menu. The level of security access, for additional staff teachers, is decided by local school administration. The example of security shown below, allows access to update grades and manage gradebook assignments.

<table>
<thead>
<tr>
<th>Contributions</th>
<th>TeacherVUE Security</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Responsibility</strong></td>
<td><strong>Amount</strong></td>
</tr>
<tr>
<td>ESOL Teacher</td>
<td>None</td>
</tr>
</tbody>
</table>

C. **Approved Innovative Model (Requires approval from the ESOL Department)**

A school may use a combination of several ESOL Delivery Models: Pull Out, Push In, and Innovative. In the Innovative Model, there is a combination of EL students and non-EL students.

- Follow the directions in this document for General Education, Gifted, EIP, and/or Special Education to determine the appropriate core subject course numbers, and to determine the teacher of record and additional staff based on the specific service area needed for the students.
- The Innovative Model is always used in content classes.
- On the Approved Innovative Model, the content teacher is **ESOL endorsed** and is the teacher of record.
- A section can only be coded with **one ESOL Delivery Model** and the models cannot be combined within a section.
- ESOL teachers should **not** be added as additional staff on the Innovative Model section.
- Use the **ESOL Delivery Model** drop down menu to choose, **6 - Approved Innovative** delivery model for the section.
Dual Language Immersion
SY2019-20: Grades K – 4th /Approved Schools Only

The Dual Language Immersion (DLI) class is a combination of EL students and non-EL students. A school may use a combination of several ESOL Delivery Models: Pull Out, Push In, Innovative, and Dual Language Immersion. However, the DLI model classes (non-English) should only be coded with the language the students are learning. Currently, Spanish on the section in Synergy.

If you have questions, regarding the DLI model that are not addressed below, administrators can contact Dr. Gregory Barfield, Dual Language Immersion Program Specialist: Gregory.Barfield@cobbk12.org.

- The Dual Language Immersion Model is always used as the ESOL delivery model for reading and language arts if the teacher is both ESOL certified and content certified.
- Follow the directions in this document for General Education, Gifted, EIP, and/or Special Education to determine the appropriate course numbers for the sections, based on the service needs for the students.

Grades Kindergarten, 1st, and 2nd

- Language Arts & Reading are the only content classes taught in English.

Grades 3rd and 4th

- Language Arts, Reading & Math are the only content classes taught in English.

Dual Language Immersion Classes: non-English Classes

- In the State Reporting area on the Synergy section screen, select the language used for instruction in the class.

DLI for Grades Kindergarten, 1st, and 2nd

- Add the language selection for any core subject section of Math, Science and Social Studies taught in a language other than English.

DLI for Grades 3rd and 4th

- Add the language selection for any core subject section of Science and Social Studies taught in a language other than English.

Additional steps continued on the next page.
Add the Dual Language Delivery Model to English Classes for Students Receiving ESOL Support (Updated for SY2019-20)

- Use the ESOL Delivery Model drop down menu to choose, **9 - Dual Language** delivery model for reading and/or language arts.
- If the teacher of record for the DLI class is not ESOL endorsed, do not code the Dual Language Delivery Model.
- If a student needs ESOL services in a class where the teacher is not ESOL endorsed, use ESOL Push In or ESOL Push Out.
V. **Synergy Reports**

**Navigation:** Click the *Reports* sub menu in the Navigation Menu to view the Report icons; or Enter the name or number of the desired report into the *Quick Launch* field.

---

**A. Report STU202: Student Schedule**

*Tip: Run a report of students’ schedules, so teachers and administrators can review them for accuracy.*

1. **Options Tab:** Enter the CCSD ID for a student to run a schedule for that specific student. Enter specific grade level, if desired, to print for a single grade level at a time.

2. **Tip:** If you are running this report prior to the beginning of school, enter the date for the first day of school into the *Filter Date* field.

3. **Options Tab:** It is recommended that the students’ personal information be hidden unless it is specifically requested or needed on the report. **Check the box to Hide All Personal Information.**

4. The report can be run by 1st period to 1st period and will only display the students’ homeroom sections.

5. **Options Tab – Grouping Info:** To sort students’ schedules, alphabetically by the homeroom teacher, select YR for the Term and Period 1 in the Grouping Info area of the options tab.
6. **Sort/Output Tab:**
   - If only active students’ schedules are needed, select the option for ‘Active Only.’
   - In the Label Options, you can choose to Hide or Show who printed the report. The person’s name will print on the bottom of the report unless it is hidden.
   - Select a different File Type, if desired.
   - Click the Add button for additional sort options, if desired

   ![Sort/Output Tab Image]

**Printing STU202 by Services - Gifted Students, EL Students, Special Ed., or EIP Students**

1. Follow the steps above to set up the Options Tab and the Sort/Output Tab with the desired data.
2. **Conditions Tab:** Click ‘Add’

   ![Conditions Tab Image]

3. The following options will display. Click the ‘Condition’ dropdown.

4. Scroll down the list to find ‘User Code 1, 2, 3, & 5.’ Select the desired selection based on the following list:

   - **User Code 1** is associated with Gifted Students
   - **User Code 2** is associated with EL Students
   - **User Code 3** is associated with Special Ed Students
   - **User Code 5** is associated with EIP Students

**NOTE:** CSIS Student Services data is used to determine the students’ that display for the selected code.
5. When the desired User Code displays in the Condition drop down, the screen will look like the one below.

6. Select ‘Equal To’ from the Operator drop down.

![Screen with User Code and Operator settings]

7. Click in the Value field, and type ‘Yes’ if selecting User Codes 1, 3, or 5 (Gifted, Sp. Ed., or EIP students)

![Screen with User Code 1 setting]

8. Click in the Value field, and type ‘ELL’ if selecting User Code 2 (EL students)

![Screen with User Code 2 setting]

9. Click Print.

**Review of Students’ Schedules**

- Print these reports and distribute them to the appropriate school personnel to review the students’ schedules.
  - Print students’ schedules, at the beginning of the school year, to ensure all students are corrected schedules.
  - During the year, as new students enroll or if edits are made for existing students, print the schedules so the appropriate school personnel can review them for accuracy.
- If edits are required, the teacher or administrator should write all the corrections needed directly on the printed schedule and return it to the data entry clerk.
  - Having all the corrections indicated directly on the students’ printed schedules makes the editing process easier for the data entry clerk.
B. Report MST406: Open Periods

The report is a list of students currently scheduled at your school. It will identify students who are missing a class or have multiple classes scheduled in the same period.

The report defaults to the current date. **Tip: If you are running this report prior to the beginning of school, enter the date for the first day of school into the As of Date field.**

1. You can choose to print by grade level, or leave selections empty for all grades.

2. If you choose to print all grade levels at once, set the Sort/Output tab page as follows (1. Grade, 2. Student Name, 3. Perm ID):

3. Click on Add to insert a new sort line, and then arrange the sorts in the order listed above. This will sort the students by grade level.

4. Click Print.

*Continued on the next page.*
5. Refer to the Legend at the bottom of the report.

6. Correct students’ schedules as needed.
C. Report MST402: Section List by Teacher

The report will display a list of sections, alphabetically by teacher. The report default is to print for all teachers. However, you have the option to print the report for one selected teacher.

- Use the report to review all the sections at your school.
- Review this report to determine if all the required sections have been created for teachers at your school.
- Review this report before adding new sections for a teacher.

1. Select a teacher or leave blank for all teachers.
2. Tip: If you are running this report prior to the beginning of school, enter the date for the first day of school into the Student totals as of field.
3. Click on Print.
4. Report will print alphabetically by Teacher Name.
How to Get a Room List Using Section List by Teacher - MST402

1. Click on the Sort/Option Tab
2. Using the drop down arrows change the sort options as follows:
   a. Change Staff Name to Room Name
   b. Delete Term Code by clicking in the X box
   c. Keep the option Begin Period.
3. Click Print.

Report will print by room number and period.

D. Report MST403: Section List by Course and Term

The report will display a list of sections at your school in numerical order of the Course Number. The sort order allows quick review of how many sections, of a particular course number, are set up at your school.

1. Report Default is set as follows. Tip: If you are running this report prior to the beginning of school, enter the date for the first day of school into the Student totals as of field.
2. Defaults are preset on the Sort/Output tab.
3. Report will print in numerical order by Course ID.

---

**E. STU401 – Student List**

The report is an alphabetical list of all students in the school or a specific grade level as determined by the selections on the report.

1. On the **Options** tab, select specific grades in the drop down boxes to view a student list for those grades.
2. Leave the grade fields **empty** to view a student list for the entire school.
3. Use the gender drop down box if only a list of boys or girls is needed.
4. Click the **Sort/Output** tab.
5. Click the drop down box under File Type to select the type of report desired. PDF is the default.
6. Select the desired selection in the Show Active/Inactive drop down.

![Image of Report STU401: Student List]

7. The report will default to sort ascending by Student Name.
8. Click the drop down for sort options to make a new selection.
9. Click the **Add** button to add additional sorting types.
   a. A list of the entire school may best be viewed if sorted by **Grade**.
10. To sort the entire school list by grade level, select the Grade first and then Student Name sort option second.
11. When all Options and Sort/Output selections have been made, click the **Print** button located at the top of the Report Interface screen.
12. The report will display in the selected format on the screen and can then be printed or saved as desired.
F. STU408 – Class List

Tip: If you are running this report prior to the beginning of school, enter the date for the first day of school into the Students Active in Class as of field.

1. Report defaults are set.

2. Select report for a specific teacher or leave blank for all.

3. If Homeroom class lists are needed, select Period 1 to Period 1.

4. To display additional student information on the report, check the desired boxes shown under Student Name.
5. Click the Sort/Output tab to select a file output type and edit/add sorting options as desired.

6. Click the Print button when all Options and Sort/Output choices have been selected. The report will display.
G. **STU601 – Active Student Totals**

1. To run a report of student totals, enter a date into the field provided. 
   Note: If you are running this report prior to the beginning of school, enter the date for the first day of school into the *As of date field.*

![Image of STU601 Student Totals Report](image)

2. Click the Sort/Output tab to select a file output type and add sorting options

![Image of Sort/Output options](image)

3. When all Options and Sort/Output selections are complete, click the Print button.
4. The report will display on the screen. (See the next page for an example.)
H. STU409 – Class Roster

The STU409 is used by teachers for written homeroom attendance. It is used by substitute teachers or a regular teacher when written attendance is needed. For example, teachers may be asked to take written attendance the first week of school.

1. The Start Date field will default to the current day. Adjust the date as needed.

2. The report can be run for a specific teacher by selecting the name from the Teacher drop down. Tip: If left blank, the report will run for every homeroom teacher in the school – very useful for the beginning of the school year.

3. Select the number of weeks desired for the report. 1 – 4 are weeks.

4. Select Period 1 for Begin & End since attendance is only taken in the homeroom class.
VI. OnTrack Scheduling Reports

OnTrack scheduling reports can be used in combination with the Synergy reports, to identify possible scheduling errors.

Tips To Look For Scheduling Errors:
- Run the reports after scheduling all students, at the beginning of the year, to identify possible errors.
- Run these reports the 1st and 15th of every month, or as needed, to identify possible scheduling errors.
- In preparation for FTE cycles, you may need to run these reports more frequently.

Navigation: CCSD Portal > OnTrack > Reports > Schedules > select from the list below -

A. Class Entry and Leave Date Outside Enrollment (SSP3214)
- The report will display students whose enter or leave dates on a section do not correspond to the students’ enrollment or withdrawal date at the school.
- Action: Research the CSIS Enrollment/Withdrawal dates to determine if an update is needed in CSIS or on the Synergy sections. Students who have a leave date on a section will display on the Student Enrollment History Tab of the section screen. Make necessary edits where needed.

B. Elementary Student Schedule Alerts (SSP4643)
- The report will display students who may have scheduling errors.
- Use the parameter to select from showing only the potential errors or to show the students’ entire schedule along with possible scheduling errors.
- Items to review are listed in the columns of the subject or course row. Possible errors include:
  - If a period or class is missing from a student’s schedule.
  - If there is an overlap of dates on a period or class.
  - If the student is active in two or more classes in the same period.
  - If there is a gap in the dates for a period or class.
    - NOTE: A gap may not be an error. If a student is enrolled at the school, withdraws and then returns to the school later in the same school year, there will be a gap in the student’s schedule. This is not an error, but does bring the student to the attention of the scheduler.
    - Review the Enter/Leave dates on the sections for accuracy.
- Action: Correct the student’s schedule in Synergy by adding missing classes, and/or by adding or editing enter and leave dates on the sections as needed.

C. Class Entry and Leave Date Outside Enrollment (SSP3214)
This helpful report identifies errors for students’ entry or leave dates on sections. The report compares the dates on the sections to the students’ CSIS school enrollment dates.
D. Section Errors Include/Exclude Attend/Grading (SSP4644)

The report displays sections that do not follow the rules below:

- Setup all Homeroom sections to be **INCLUDED IN ATTENDANCE and INCLUDED IN GRADING**.
- Setup all non-homeroom sections to be **EXCLUDED FROM ATTENDANCE and INCLUDED IN GRADING**.

**EXCEPTON:**
- Sections created for Gifted Resource (Target Classes) are **EXCLUDED FROM ATTENDANCE AND EXCLUDED FROM GRADING**.

If your school has a special situation where the target teacher takes attendance, the section can be included in Attendance. Contact the Synergy Team for questions, if needed.

**Action:** When errors display on the SSP4644, update the section screen so the attendance and grading options match the rules above.

E. Staff History Start Date Discrepancy (SSP4656)

This report displays the sections where the Staff Name (teacher) effective date is after the students’ enter date. Accuracy for the teacher’s effective date, on a section, is important since it relates to TKES and growth measure.

- A record could display if a section is created after the first day of school. The teacher or staff’s effective date on a section will default to the date the name is added to the section in Synergy. To avoid errors, ensure that the Staff History Tab is reviewed and the teacher’s enter date is changed to match that of the earliest start date in the class.
  - If the primary staff changes during the school year, confirm that the correct effective date for the new teacher displays on the Staff History Tab.
- **Additional Staff** may also display on the SSP4656 report.
  - The date that displays for the additional staff may be correct if the teacher did not start in the class the same day as the students. For example, a supply teacher or Special Education co-teacher may begin in the class later in the school year and therefore would not have the same start date as the students’ enter date.
  - Confirm the start date is correct for any additional staff added on a section. As long as it is correct, make a note for later since it will continue to display on the discrepancy report.

- **Editing the Staff History Tab**
  - **Action (1):** On the section, click the Staff History Tab and change the teacher’s effective date to match the date of the earliest start date in the class.
  - A note will display that the history is about to be change – Click Ok.
  - **Action (2):** On the section, click the Additional Staff Tab and change the additional staff’s start date to the match the earliest start date in the class ONLY if that is the appropriate action.
  - **Tip:** If an Additional Staff teacher has an end date on a section, the record will display on the Staff History Tab. The dates should still be edited, if needed.

- **This report is informational only and should not be used to determine the actual effective date of a teacher. Please ask an administrator if you are unsure of a teacher’s effective date on a section. This includes the main teacher of record, additional staff teachers, and supply teachers added as additional staff.**
I. OnTrack Reports

**Navigation:** CCSD Portal > OnTrack > Reports > VARIOUS TOPICS > select from the menu list

Be sure to check out all of the menu options under OnTrack Reports. Users will find many helpful reports in the various menus.

Some examples -

- The **Teacher Roster (SSP4658)**, found under the Reports > General menu option, is a helpful tool. It can be used by teachers to review and confirm that they are scheduled with the correct students.
  - **Great Tip:** Use this report to review teachers who have been added as additional staff.

- The **School Enrollment (SIS4025)**, found under the Reports > General menu option shows enrollment numbers broken down by grade level.

- In the menu **Reports > FTE**, there are several reports to help users during the FTE windows.

II. OnTrack Queries

**Navigation:** CCSD Portal > OnTrack > Queries > VARIOUS TOPICS > select from the menu list

OnTrack queries are updated nightly; therefore, the data will be as of yesterday. Numerous queries are available and access varies based on users’ security level.

Schedulers will find helpful queries under the **General** and **Scheduling** areas. The queries contain different data depending on which is selected.

The Excel download provides users the ability to filter or sort information as needed.

- **Tip:** The **Student Roster with Schedule**, found under the Queries > General menu option, includes data for all students in the school and lists teachers as primary and additional staff. It also includes the Delivery Model, if one was added on a section in Synergy.