After-Rollover Activity Guide - PA

ClassMate Suggested Data Review after Annual Rollover

Below is a list of a variety of areas that may require data updates/modifications **AFTER** System Rollover is complete depending upon the needs of your CTC.
It is very important that you review this guide and make the necessary modifications that apply to your site **BEFORE the first day of school** for students, as some of these items cannot be adjusted after the first day of school for students occurs.

1. **Run No Occupational Enrollment Report (under Reports > Student Enrollment)**
    - Review report and either delete students using **Remove/Return Student** module for those students who are not attending the CTC for next year or Enroll/Schedule students who are returning to the CTC for next year.
    - One possible reason that a student may appear on this report is that they were missed during projections.

2. **Non-Resident Student Status Updates**
    - Non-resident students must be identified, and properly recorded as such by the CTC staff, so they are reported correctly to the appropriate sending districts.
    - Enter/Adjust any Non-Resident Student Status data based off information received from the sending districts using the Non-Resident Updates tab in **Student Scheduling** module.

3. **Student Data**
    - Students, which qualify as special populations, must be properly recorded as such by the CTC staff, so they are reported properly to PIMS/PDE.
    - Enter/Adjust any student special population data based off information received from the sending districts. Flag students in **Student Master Information** module > Student Information tab and make individual selections / enter IEP detail in **Student Special Population Information** module
    - Students with Military Guardians need to be flagged in **Student Master Information** module > Student Information tab and updated at the beginning of each school year if this status has changed and is known.

4. **New Employee Hires**
    - Newly hired employees need to be created as Employees using **Employee Management** module, including their email address.
    - ClassMate usernames & passwords are created using **ClassMate User Management** module.
    - Modules/reports/web pages are assigned using **User Module Management** module.
    - New Instructors also need to be assigned to their classes in the **Instructional Course Offerings** module or **School Educator Assignment by Class** module (if they are a supporting instructor).
    - Please create a TeamSupport ticket for New Employees Gateway account creation. Include First Name, Last Name, Email Address, ClassMate Username

and identify Admin/Support Staff or Teacher.

5. **Retired/Terminated/Resigned Employees**
   - After rollover you can mark inactive employees/teachers who have retired, were terminated, or resigned in **Employee Management**.
     i. Because of PIMS Staff reporting these employees cannot be deleted from Employee Management module until you perform the Staff PIMS reporting and report their exit date, exit reason, etc.
   - After rollover you can delete/remove ClassMate usernames for employees/teachers who have retired, were terminated, or resigned using **ClassMate User Management**.
   - Make sure if it was a teacher who retired, was terminated, or resigned that you update the classes in **Instructional Course Offering** module and assign the new teacher.
   - Upon removing employees from your ClassMate User Management please create a TeamSupport ticket and identify Classmate Username and Email Address, so we can remove Gateway access.
   - District Portal users – use **Joomla** to remove any users who no longer need access to District Portal

6. **Base Data Updates for Existing Program Titles/Course Offerings**
   - Any programs/courses, which were assigned to teachers who have had certification changes, must be updated in order to report accurate student data for PIMS. You can make these adjustments using **Course Certification Management** module.
   - Any programs whose CIP code has been reclassified (one CIP to another CIP) needs to be updated using **ClassMate ID Control** module.
   - Any Program/Course Titles that require changes should be performed using **Instructional Course Offerings** module.
   - Any instructor changes to class assignments (ex: new instructor for next year has been hired for Auto Technology) need to be made in **Instructional Course Offerings** module.
   - If # of seats has changed for some of your courses, make the updates in **Location/Building/Room Management** module, then use the Sync Seats option in **ClassMate Master Control** module > Miscellaneous Tab to sync the newly updated Seat #'s to the class(es) they are attached to.

7. **Base Data for Program Occupations within Career Objectives**
   - Career objectives are available from the software but will be incomplete unless CTE-specific program occupations are entered into the system using **Career Pathways Management** module.
   - In addition to completing the O*Net ID you must enter the SOC code in order to print accurately on the generated **PDE-408 Career Objective Form** (found under Reports > State Reporting)

8. **Base Data for State-Approved Program**
   - All state-approved programs being taught at the CTE should be reviewed to make sure that they are properly "flagged" as state approved on the Courses tab in **Instructional Course Offerings** module.
   - If the Approved Program offers an End of Program Exam, please be sure the appropriate EOP Exam radio button is flagged on the Programs tab.
   - Check to be sure Technical Hours and Program Length matches your Program Approval on each Class tab.

9. **Curriculum Management (Duties and Tasks)**
   - Duties and tasks for each curriculum must be updated over the summer, according to the information provided by occupational instructors prior to their summer departure or per PDE for those programs that are Program of Study (POS) and where PDE releases POS updates for.
   - Updates to Curriculum may include additions, deletions, and/or imports.
   - Skill level changes to curriculum must be updated after system rollover.
   - These updates can be made individually using the **Curriculum Management** module or by using the **POS Curriculum Maintenance** module OR if the POS was adopted and an entire curriculum needs to be changed please use the **Curriculum Imports** module and follow the instructions provided in the module.

10. **Student Enrollment/Schedule Updates**
    - Adjust student enrollment/schedule data related to any potential updated information received from the sending districts.
      Example: Student A was projected into Auto Body AM, but since System Rollover the sending district has informed you that Student A now needs to attend the CTC in the PM, the students schedule would need to be updated.
    - Adjust any students district who might have moved based off information received from sending districts.
    - If you need instruction on how to properly make Enrollment/Scheduling adjustments, please review the **Enrollment Scheduling Scenarios** documentation on our website.

11. **Sending School Schedules / Time Summary Updates**
    - Review each sending school schedule in the **Sending School Management** module (AM, PM and special sessions) and verify that the length of time in Hours & Minutes is still accurate. If any changes need to be made, make them now, after rollover, but before school starts.
    - In the **Instructional Time Summary** module > Procedures tab, you can purge/remove the association to the students using #1. Zero School #
      You can then reset all student associations to the default schedule using #2. Reset Schedules.
    - Any student that has a special schedule will need to be updated manually in the **Student Scheduling** module > District Updates tab.

12. Class Room Assignments
- If any classes have moved rooms (example: Health Careers was in room 129 but this summer was moved to 201) update the room information in the **Location/Building/Room Management** module.
- Then update the room for each of the classes under the course in the **Instructional Course Offerings** module.

13. Continue Registration & Enrollment of New Students
- If any new student applications are received after System Rollover, continue to register and enroll these students for the school year.
- Remember, even though the school year hasn't started, Rollover has been completed, so you are now in the NEW year. Therefore, the calendar for the student you are creating in Registration should reflect the CURRENT school year calendar.
- If you use Projection modules after rollover to do enrollments, you will choose the "Current School Year" radio button.

14. School Calendar
- Review School Calendar and ensure that all in-services & holidays are marked within the software.
  Suggested Report – **School Calendar Days by Type**

15. Calendar Session Management
- Enter/Review Marking Period Dates, Alternate Marking Period Dates, Semester Dates, Rotation Dates, Coop Sessions, etc and make sure that the data is entered for the school year.
- It is very important that these dates be entered **BEFORE** the First Day of School for Students.

16. Period Management
- Review and if necessary, make any changes to period Start/End times, days periods are offered, etc.
  - i. Ensure that all periods are set to the start/end times that are effective for upcoming school year.
- If necessary, create any new periods.
- If using Day About at your school, be sure you are checking off the "Day About" check box and identifying the correct day cycles that the period will meet.
- You will also need to circle back around to School Calendar Management module and indicate that this location has classes that will use a particular Day Cycle/Rotation (2nd tab).

17. Grading Changes
- If necessary, make any changes to Marking Period (MP), Semester, and/or Final Formulas in **the School Grade Formulas** module. Formulas are created in the School Grade Formulas module and then assigned to classes in the **Instructional Course Offerings** module on the Classes tab.

- If necessary, make any changes to knowledge category weights in the **Knw. Category Weights by Class** module.
- If necessary, make any changes to Work Ethic Range, Task Range, Task Rubric, and/or Work Ethic Rubric in the **ClassMate Custom Control** module.
- If teachers want to delete their **Knowledge Bank** and start fresh, they should do so at this time – select Class > Delete > Delete All Activities by Session - the deletion of the knowledge banks cannot be performed until after system rollover.
- It is **VERY** important that all grading related changes be made **BEFORE** the first day of school starts.

18. Discipline Maintenance
- If necessary, make any changes to Discipline Codes/Infractions using the **Discipline Maintenance** module, based on any changes to your Student Code of Conduct which appears in your Student Handbook.
- Review Merits an Arrest / Merits a Citation / Severity currently assigned and make any necessary changes.

19. Attendance Condition / Work Ethic Default Changes
- If necessary, make any changes to Attendance Conditions using the **Attendance Condition Information** module. Any conditions should be changed before the first day of school starts.
  Suggested Report – **Attendance Condition Report**
- Review Work Ethic (WE) defaults and make any necessary changes. All Work Ethic default changes must be made before the first day of school for student's starts.
- Review Attendance Conditions that your site wants negated (99 No Grade) make sure ALL Negate Day Attendance Conditions are flagged before 1st Day of School.
- Once School starts Attendance Condition WE grade defaults cannot be altered so it is **VERY** important to review and make any necessary changes **BEFORE** the 1st Day of School.

20. Work Ethic Pre-Defined Comments
- If not already entered please make sure to enter/update the Work Ethic Pre-defined comments for your site so that they are available for teachers to start using on the 1st day of school for students.
- If there are pre-defined comments that your site no longer want available please make sure to delete them before the 1st day of school for students.
  * These changes are made on the Work Ethic Base Data tab in the **Attendance Condition Information** module.

21. Progress Report Comment Data Entry
- Make sure to perform any Progress Report Comment Data Entry/Modifications including deleting any comments before 1st MP Progress Reports are due so instructors can complete Progress Reports.

- Any Progress Report Comments that are no longer valid should be deleted before the 1st day of School so that these comments do not appear when instructors go to start submitting Marking Period 1 Progress Reports.
  * These changes are made on the Progress Report Comments tab in the **Admin Grade Comments** module.

22. **Report Card Comment Data Entry**
    - Make sure to perform any Report Card Comment Data Entry/Modifications including deleting any comments before 1st MP Grades are due so instructors can complete comment selection.
    - Any Report Card Comments that are no longer valid should be deleted before the 1st day of School so that these comments do not appear when instructors go to start submitting Marking Period 1 report card comments.
      * These changes are made on the Report Card Comments tab in the **Admin Grade Comments** module.

23. **Clean up M: Drive**
    - Review your files saved in M:\classmate folders to ensure old, possibly, unnecessary files aren't taking up room. Remove any previously exported files either by moving them to a local or external drive to save for future use and then deleting from M: Or, if known not needed, by just deleting. You can refer to the Maintaining your M: Drive documentation on our website under the ClassMate System Administrator category. https://www.classmate.net/classmate-user-state-documentation/

24. **Purge Registration – optional**
    - If you'd like to purge Registration records, you can do so at this time by using the **ClassMate Master Control** module (under System Administrator category).
    - Select the Purge tab if you want to Purge ALL Registration records leave the default 999 in the Grade field at #1. Registration Purge > then select the True radio button and Save.
        i. This will remove ALL student information from Registration, except those students who have a Student Master record (less 1 year – so if you leave your current calendar it will NOT purge registration for that year – if you want to keep 2 years then change the calendar year in the drop down to the last school year and it will not purge current year or the year selected in the drop down)
    - If you want to purge only Seniors, which is typically what occurs, you would enter 012 in the Grade field and then the *True radio button and save. This will then only delete students from Registration who are currently in Student Master as grade level 012 & in the Calendar Year you have selected from the dropdown at the top of the module.
    - If you want to purge other grade levels individually you need to be sure you are entering with the preceding "0" as this is a 3-character field

25. **District, Parent, Student Portal Users – optional** – review & clean up or Purge Users using Joomla

*** After Annual System RollOver is completed and BEFORE your New School Year begins ***
Review & perform any necessary system changes using the After-Rollover Activity Guide.
Below is a Checklist to use internally to prepare for your New School Year

After RollOver Modifications Checklist

Please use this checklist to review ALL recommended categories and if any necessary adjustments made you can notate and file for future reference.

1. **Run/Review No Occupational Enrollment Report**   **COMPLETED** ____

2. **Non-Resident Student Status Updates**   **COMPLETED** ____

3. **Student Data**   **COMPLETED** ____

4. **New Employee Hires**   **COMPLETED** ____

5. **Retired/Terminated/Resigned Employees**   **COMPLETED** ____

6. **Base Data Updates for Existing Programs**   **COMPLETED** ____

7. **Base Data Updates for Program Occupations**   **COMPLETED** ____

8. **Base Data for State Approved Programs**   **COMPLETED** ____

9. **Curriculum Management**   **COMPLETED** ____

10. **Student Enrollment/Schedule Updates**   **COMPLETED** ____

11. **Sending School Schedules/Time Summary**   **COMPLETED** ____

12. **Classroom Assignments**   **COMPLETED** ____

13. **Continue Registration & NEW Student Enrollments**   **COMPLETED** ____

14. **School Calendar**   **COMPLETED** ____

15. **Calendar Session Management**   **COMPLETED** ____

16. **Period Management**   **COMPLETED** ____

17. **Grading Changes**   **COMPLETED** ____

18. Discipline Maintenance   COMPLETED ____

20. Attendance Condition / Work Ethic Default   COMPLETED ____

21. Work Ethic Pre-Defined Comments   COMPLETED ____

22. Progress Report Comments   COMPLETED ____

23. Report Card Comments   COMPLETED ____

24. Clean up M: drive   COMPLETED ____

25. Purge Registration   COMPLETED ____

26. District & Student Portals   COMPLETED ____

_____   _____

Signature   **Date**

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Location (s)