

# Checklist for Scheduling

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Preparing for the scheduling season includes the creating of new school calendars, processing enrollments, reviewing existing schedules, modifying courses, opening the course registration and scheduling students into courses.

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This document is aligned with training materials provided during Scheduling Bundle training. If you are interested in this training, have your authorized support contact submit a support case with **Scheduling Bundle** in the subject line, and the Infinite Campus Training Department will be in contact.

This checklist assumes that all appropriate and necessary parties have been involved in discussions that may have altered calendars and day schedules for the next school year.

The [Scheduling Center](#) provides an overview of a school's progress towards completion of scheduling-related tasks. It is modeled after this checklist and can be used to track percentages and review tasks that need attention.

## Part 1. Calendars and Enrollments, Calendar Rights, Departments

### Calendars

Done	Task	Responsible Party
	Configure the next <a href="#">School Year</a> .	

Done	Task	Responsible Party
	<p>Create a calendar for the next school year using the <a href="#">Calendar Wizard</a> and one of the available options:</p> <ul style="list-style-type: none"> <li>• <a href="#">Create a New Blank Calendar</a></li> <li>• <a href="#">Create New Calendars by Rolling Forward</a></li> <li>• <a href="#">Copy Data into Existing Calendars</a></li> </ul>	
	<p>Modify <a href="#">Calendar Start and End Dates</a>.</p> <p>Add extra days at the beginning and end of the year to allow for professional development workshops and emergency days (snow days).</p>	
	Review the <a href="#">Grade Levels</a> in each calendar.	
	Review <a href="#">Calendar Schedule Structures</a> .	
	Modify <a href="#">Term</a> structure (quarter, trimester, etc.) and Dates on all calendar and/or schedule structures.	
	Review existing <a href="#">Period Schedules</a> and determine if additional schedules are necessary to allow for period schedules for Responsive Scheduling days and for days that may have a different schedule (shortened days, final exam testing, etc.)	
	Review <a href="#">Period</a> start and end times.	
	If necessary (depending on your state), update <a href="#">School Months</a> for the new school year.	
	<a href="#">Reset days</a> on all calendars and/or schedule structures.	
	<a href="#">Rotate days</a> on all calendars and/or schedule structures, if applicable.	

## Responsive Scheduling

Before implementing [Responsive Scheduling](#) as a part of the school's offerings, review your business processes and discuss this opportunity with the appropriate individuals. This affects all areas of a school, including administrators, attendance clerks, teachers, counselors, curriculum directors, etc. Consider the benefits and consequences involved with the following:

- Calendar changes (new periods, different schedule structures, period length, instruction minutes, etc.)
- New programs/courses to offer
- Course placement
- Attendance tracking

Done	Task	Responsible Party
	Review your overall approach to educating students prior to implementing this tool.	
	(If necessary), create a separate <a href="#">period schedule</a> for the responsive courses.	
	Mark which periods in the <a href="#">period structure</a> can be marked as responsive, indicating responsive courses can be scheduled into them.	
	Mark the <a href="#">courses</a> that allow responsive offerings.	

Other tasks are necessary to complete the [Responsive Scheduling process](#). The items above are needed to build calendars and courses for this process properly.

## Enrollments

Done	Task	Responsible Party
	Communicate to office staff that enrollments will be rolled forward. State Reporting enrollment changes made to the current enrollment record will also need to be made in next year's enrollment record.	
	Set <a href="#">Next Calendar, Next Grade</a> on the student's current year enrollment for those who will NOT roll forward by grade sequence or <a href="#">school boundary</a> .  Use the <a href="#">Census by School Boundary Report</a> as a planning tool.	
	Roll <a href="#">student enrollments forward</a> . Use the first day of school as the start date.	
	Remove enrollments for those students who are not returning next year using the <a href="#">Enrollment Cleanup Wizard</a> .	

## Reports and Transportation Data

Done	Task	Responsible Party
	Copy <a href="#">schedule reports, report cards and transcript reports</a> into the new calendar using the <a href="#">Reports Roll Forward</a> tool.  Any changes needed to these reports should be made in the new calendar.	

Done	Task	Responsible Party
	Copy transportation data into the new calendar using the <a href="#">Transportation Roll Forward</a> tool.  Any changes needed to transportation data should be made in the new calendar.	

## User Security

Done	Task	Responsible Party
	Add a Scheduling Preparation Tool Right <a href="#">User Group</a> .	
	Add a Scheduling Wizard Tool Right <a href="#">User Group</a> .	
	Add a New Year <a href="#">Calendar Group</a> for each school.	
	Add the schedulers to the appropriate <a href="#">Tool Right</a> Group(s) and Calendar Group(s).	
	Add <a href="#">calendar rights</a> and <a href="#">tool rights</a> for select scheduling users and user groups to provide access to the new calendar.	

## Teacher Assignments

Done	Task	Responsible Party
	Review <a href="#">employment records</a> and <a href="#">credentials</a> for teachers, and modify as needed.	
	Assign departments, mark necessary checkboxes and other necessary <a href="#">district assignment information</a> for teachers.	

# Part 2. Preparing Courses, Entering Requests and Generating Reports

## Course Preparation

These steps can also be done using the [Course Master](#) functionality.

Done	Task	Responsible Party
	Determine if <a href="#">Section Templates</a> are needed for your period schedule. If yes, create Section Templates and Template Groups for each term.	
	Add <a href="#">new courses</a> that will be offered for the year.	
	Attach <a href="#">Departments</a> to <a href="#">Courses</a> .	
	Check the number terms, schedules and periods of the <a href="#">Course</a> .	
	Determine if the course can be <a href="#">requested</a> by students.	
	Mark the appropriate courses <a href="#">active</a> .	
	Mark courses for <a href="#">Section Templates</a> , if applicable.	
	Select the desired scheduling priority (if applicable).	
	Establish <a href="#">Course Rules</a> .	
	Assign teachers to <a href="#">Departments</a> .	

## Request Entry

Done	Task	Responsible Party
	Hand enter requests using the <a href="#">Walk-In Scheduler</a> for special circumstances (students who have particular needs).	
	Mass enter student requests through the <a href="#">Request and Rosters</a> .	
	<p>Allow students to enter their own requests through <a href="#">Campus Student</a>.</p> <p>In order for students to request courses using the Course Registration process, the following must be done:</p> <ul style="list-style-type: none"> <li>• New <a href="#">School Calendar</a> needs to be created.</li> <li>• Students must have enrollments in the next year's calendar.</li> <li>• The <a href="#">Portal Option</a> for Course Registration must be selected.</li> <li>• Students must have Portal accounts.</li> <li>• Students must know their username and password.</li> </ul>	

Done	Task	Responsible Party
	If you are using academic planning functionality: <ul style="list-style-type: none"> <li>• Complete the <a href="#">Academic Planning Process</a> for academic plans.</li> <li>• <a href="#">Lock plans</a>.</li> <li>• <a href="#">Create Course Requests</a>.</li> </ul>	
	Have teachers <a href="#">request courses</a> for students.	
	Run the Scheduling Request Reports as needed: <ul style="list-style-type: none"> <li>• <a href="#">Request Batch</a></li> <li>• <a href="#">Request Conflicts</a></li> <li>• <a href="#">Schedule Units Report</a></li> <li>• <a href="#">Request Detail</a></li> <li>• <a href="#">Requests Satisfied</a></li> </ul>	
	Create <a href="#">Scheduling Groups (Teams)</a> and assign teams on the <a href="#">wlk-inWalk-In Scheduler</a> or use the <a href="#">Fill Teams Wizard</a> .	

## Part 3. Teacher and Course Planning

### Planning the Schedule

Done	Task	Responsible Party
	Use the <a href="#">Requests Satisfied</a> Report to determine how many sections will be needed.	
	Use the <a href="#">Master Schedule Report</a> from a prior year as a guide to pre-clean up the new calendar.	

### Scheduling Board

Done	Task	Responsible Party
	Access the <a href="#">Scheduling Board</a> . <ul style="list-style-type: none"> <li>• Understand <a href="#">Scheduling Trials</a>.</li> <li>• Review the <a href="#">Course Planner</a> and become familiar with its functions.</li> <li>• Review the <a href="#">Staff Planner</a> and become familiar with its functions.</li> </ul>	

Done	Task	Responsible Party
	<p>Create a copy of a <a href="#">Trial</a> based on the previous year's trial.</p> <p>Every time you create a new trial, name it and specify what is happening in the trial and add a date. For example, Second Build - 3/31 would be the second time you added courses on the 31st of March.</p>	
	<p>Set teacher constraints (rooms, free period, etc.) using the <a href="#">Staff Planner</a>. This can also be done using the <a href="#">Build Constraints</a> or the <a href="#">Course Build Constraints</a> tools.</p>	
	<p>Use the <a href="#">Course Planner</a> to build a first run schedule based on requests.</p>	
	<p><a href="#">Build</a> the course schedule. OR</p>	
	<p>Manipulate the course schedule by moving sections and manually creating sections.</p> <p>Note that the master course schedule can be built several ways, based on your district needs:</p> <ul style="list-style-type: none"> <li>• Manually build the course schedule using last year's schedule.</li> <li>• Auto-build the course schedule by scheduling the singleton courses first, then scheduling other courses.</li> <li>• Use a combination of these two options until course requests are met.</li> </ul>	
	<p>When using the planning tools, verify the following is in place:</p> <ul style="list-style-type: none"> <li>• Rooms are created if using them as constraints.</li> <li>• Teachers are assigned to appropriate courses.</li> <li>• Once resources are allocated and constraints are set, space for the course needs to be available in the existing schedule layout.</li> </ul>	

## Part 4. Scheduling Students

### Manipulate the Schedule

Done	Task	Responsible Party
	<p><a href="#">Load</a> the course requests onto the Scheduling Board.</p>	
	<p>Continue moving courses and sections to reach the desired request complete percentage.</p>	

Done	Task	Responsible Party
	When finished, mark the desired <a href="#">Trial</a> active.	

## Schedule Cleanup and Completion

Done	Task	Responsible Party
	Use the <a href="#">Student Gap Scheduler</a> and the <a href="#">Schedule Gap Filler</a> to complete schedules.	
	Use the <a href="#">Walk-In Scheduler</a> to manually modify student schedules.	
	Use <a href="#">Request and Rosters</a> to place students in one section of a calendar into another section in another calendar.	
	Use the <a href="#">Fill Teams</a> wizard to assign scheduling teams to students.	
	<p>When participating in <a href="#">Cross-Site Enrollment</a>, schedule students into Cross-Site Courses at the very last step in the scheduling process.</p> <div> <p>As part of the overall Scheduling process, enrolling students in Cross-Site Courses occurs AFTER all other Scheduling at both the Home School and the Serving School is complete and the Scheduling Trial is marked Active.</p> </div>	