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.

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 School Year.	
	Create a calendar for the next school year using the Calendar Wizard and one of the available options: • Create a New Blank Calendar • Create New Calendars by Rolling Forward • Copy Data into Existing Calendars	
	Modify Calendar Start and End Dates. Add extra days at the beginning and end of the year to allow for professional development workshops and emergency days (snow days).	
	Review the Grade Levels in each calendar.	
	Review Calendar Schedule Structures.	
	Modify Term structure (quarter, trimester, etc.) and Dates on all calendar and/or schedule structures.	

Done	Task	Responsible Party
	Review existing Period Schedules 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 Period start and end times.	
	If necessary (depending on your state), update School Months for the new school year.	
	Reset days on all calendars and/or schedule structures.	
	Rotate days 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 period schedule for the responsive courses.	
	Mark which periods in the period structure can be marked as responsive, indicating responsive courses can be scheduled into them.	
	Mark the courses 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 Next Calendar, Next Grade on the student's current year enrollment for those who will NOT roll forward by grade sequence or school boundary. Use the Census by School Boundary Report as a planning tool.	
	Roll student enrollments forward. Use the first day of school as the start date.	
	Remove enrollments for those students who are not returning next year using the Enrollment Cleanup Wizard.	

Reports and Transportation Data

Done	Task	Responsible Party
	Copy schedule reports, report cards and transcript reports into the new calendar using the Reports Roll Forward tool. Any changes needed to these reports should be made in the new calendar.	
	Copy transportation data into the new calendar using the Transportation Roll Forward 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 User Group.	
	Add a Scheduling Wizard Tool Right User Group.	
	Add a New Year Calendar Group for each school.	
	Add the schedulers to the appropriate Tool Right Group(s) and Calendar Group(s).	

Done	Task	Responsible Party
	Add calendar rights and tool rights for select scheduling users and user groups to provide access to the new calendar.	

Teacher Assignments

Done	Task	Responsible Party
	Review employment records and ccredentials for teachers, and modify as needed.	
	Assign departments, mark necessary checkboxes and other necessary district assignment information 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 Section Templates are needed for your period schedule. If yes, create Section Templates and Template Groups for each term.	
	Add new courses that will be offered for the year.	
	Attach Departments to Courses.	
	Check the number terms, schedules and periods of the Course.	
	Determine if the course can be requested by students.	
	Mark the appropriate courses active.	
	Mark courses for Section Templates, if applicable.	
	Select the desired scheduling priority (if applicable).	
	Establish Course Rules.	
	Assign teachers to Departments.	

Request Entry

Done	Task	Responsible Party
	Hand enter requests using the Walk-In Scheduler for special circumstances (students who have particular needs).	
	Mass enter student requests through the Request and Rosters.	
	Allow students to enter their own requests through Campus Student. In order for students to request courses using the Course Registration process, the following must be done: • New School Calendar needs to be created. • Students must have enrollments in the next year's calendar. • The Portal Option for Course Registration must be selected. • Students must have Portal accounts. • Students must know their username and password.	
	If you are using academic planning functionality: • Complete the Academic Planning Process for academic plans. • Lock plans. • Create Course Requests.	
	Have teachers request courses for students.	
	Run the Scheduling Request Reports as needed: • Request Batch • Request Conflicts • Schedule Units Report • Request Detail • Requests Satisfied	
	Create Scheduling Groups (Teams) and assign teams on the Walk-In Scheduler or use the Fill Teams Wizard.	

Part 3. Teacher and Course Planning

Planning the Schedule

Done	Task	Responsible Party
	Use the Requests Satisfied Report to determine how many sections will be needed.	

Done	Task	Responsible Party
	Use the Master Schedule Report from a prior year as a guide to pre-clean up the new calendar.	

Scheduling Board

Done	Task	Responsible Party
	Access the Scheduling Board. • Understand Scheduling Trials. • Review the Course Planner and become familiar with its functions. • Review the Staff Planner and become familiar with its functions.	
	Create a copy of a Trial based on the previous year's trial. 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.	
	Set teacher constraints (rooms, free period, etc.) using the Staff Planner.	
	Use the Course Planner to build a first run schedule based on requests.	
	Build the course schedule. OR	
	Manipulate the course schedule by moving sections and manually creating sections. Note that the master course schedule can be built several ways, based on your district needs: • Manually build the course schedule using last year's schedule. • Auto-build the course schedule by scheduling the singleton courses first, then scheduling other courses. • Use a combination of these two options until course requests are met.	

Done	Task	Responsible Party
	When using the planning tools, verify the following is in place: • Rooms are created if using them as constraints. • Teachers are assigned to appropriate courses. • Once resources are allocated and constraints are set, space for the course needs to be available in the existing schedule layout.	

Part 4. Scheduling Students

Manipulate the Schedule

Done	Task	Responsible Party
	Load the course requests onto the Scheduling Board.	
	Continue moving courses and sections to reach the desired request complete percentage.	
	When finished, mark the desired Trial active.	

Schedule Cleanup and Completion

Done	Task	Responsible Party
	Use the Student Gap Scheduler and the Schedule Gap Filler to complete schedules.	
	Use the Walk-In Scheduler to manually modify student schedules.	
	Use Request and Rosters to place students in one section of a calendar into another section in another calendar.	
	Use the Fill Teams wizard to assign scheduling teams to students.	

Done	Task	Responsible Party
	When participating in Cross-Site Enrollment, schedule students into Cross-Site Courses at the very last step in the scheduling process. 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.	