Academic Planning (Student Information) - best practices and workflow

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Path: Student Information > Academic Planning

Academic Planning allows schools to create an academic plan encompassing a student's entire high school career, as well as track a student's progress toward graduation. This typically includes 8th-grade students moving into 9th grade all the way through their senior year, but can be used for grade levels Kindergarten through 12th grade.

Academic Planning (Student Information) includes the following tools:

- Programs
- Progress
- Course Plan

Best practices and things to know

It is not required to use Academic Planning functionality, but if you do, there are certain things to consider. The articles linked in the Tools column below contain a Best Practices section for these considerations.

- Academic Planning considers all enrollment types.
- Only one credit group is allowed per academic program.
- The Credit Summary report can only be generated from the student's Credit Summary tab. However, this information can be viewed on the student's Transcript, by building an Ad Hoc filter or generating other Grading and Standards Reports.
- Course Catalogs used in different schools (for example, middle school and high school) should have unique course numbers.
- Terms must be entered in Course Information in order for course Progress information to display correctly for students.
- The Course Plan tool is used by counselors to populate the student's academic plan. Students can see this academic plan on their Academic Planner in the Portal. In turn, counselors can see the student's changes on the Academic Planner by viewing the Course Plan tool.
- If a student is scheduled (has a roster entry) into a course, grades for that course must be posted to the transcript using the Transcript Post tool. Grades may not be manually entered.

Academic Planning prerequisites

The following areas must be appropriately established in order to properly use the Academic Planning tools:

Done	Task

Done	Task
	Establish Credit Groups. This is a list of credits a student can earn based on completion of grading tasks or achieving a certain level of scores. Credit Groups define what credits have been earned and under what group earned credits fall.
	Create Graduation Programs and/or Academic Programs. Creation of these programs includes any combination of the following: • Credit Requirements • Course Requirements • Test Requirements • Compound Requirements • Academic Requirements • GPA Requirements • Course Plan Templates See the appropriate Programs article for detailed guidance on creating Graduation and Academic Programs.
	Assign programs to students. This can be accomplished manually (one student at a time) on the Academic Planning Programs tab or through the Batch Assignment Tool.

Academic Planning workflow

Click here to expand...

Before beginning this process, gather the necessary documents for:

- State Graduation Requirements
- District Graduation Requirements
- Course Requirements
- Course Prerequisites
- School Course Catalog
- Student Handbook

Also, verify and/or assign tool rights for appropriate staff.

Task		Campus Location
Curriculum Director		
1.	Set up Credit Groups and Credit Types.	Grading and Standards > Credit Groups
2.	Create Course Masters and Course Catalogs.	Grading and Standards > Course Masters Grading and Standards > Course Catalogs

Task		Campus Location
3.	Set Credit Overflow Override on the Course Grading Task or on the Course Master Grading Tasks.	Scheduling > Courses > Grading Task Grading and Standards > Course Masters > Grading Task
5.	Review the Transcript Report Preferences.	System Administration > Preferences > Reports > Transcript
6.	Set Course Planning Rules.	Scheduling > Courses > Course Rules > Planning Rules
7.	Set Course Editor checkboxes related to Academic Planning.	Scheduling > Courses > Course
8.	Roll calendars forward.	System Administration > Calendar > Calendar Wizard > Create New Calendars by Rolling Forward
9.	Create an ad hoc report to see Course Rule information.	Ad hoc Reporting > Filter Designer
10.	Create Graduation Program(s):	Student Information > Program Administration > Academic and Graduation Programs
	Create Academic Program(s):	Student Information > Program Administration > Academic and Graduation Programs
Counselor		
11.	Assign academic programs to students, either manually or in batch. When the program has been assigned: • Verify the assignment on the Program tab. • View the student's Progress tab. • View the student's Course Plan.	Student Information > Academic Planning > Programs Program Admin > Batch Assignment Tool
Campus Administrator		
12.	Mark the *Academic Planner* to display in the Portal/Campus Student.	System Administration > Portal > Preferences > Display Options
Student and Parent/Guardian		
13.	Review progress toward graduation in the Portal	Portal > Academic Progress

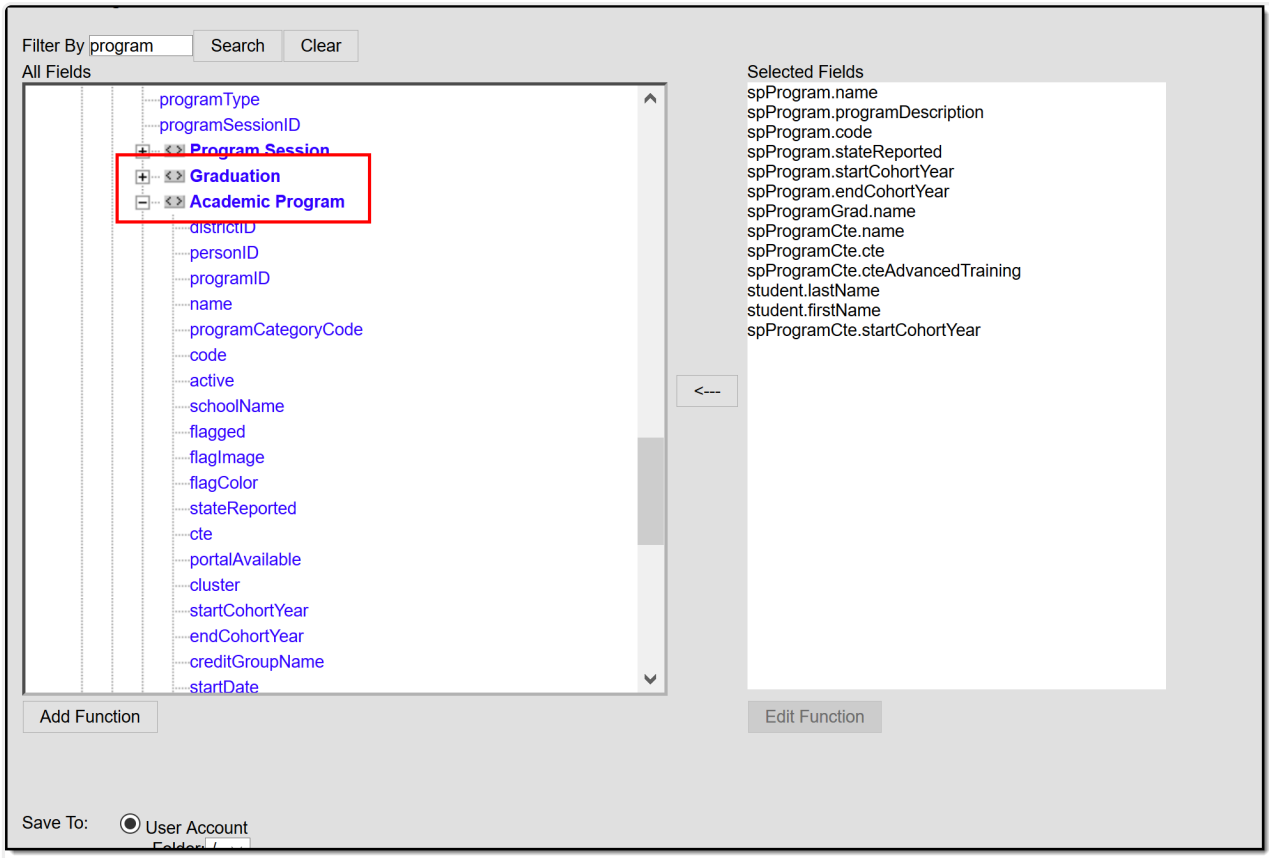
Task		Campus Location
14.	(Student) Create or update the academic plan in the Portal (Parent) Review and approve the child's academic plan in the Portal	Portal > Academic Planner
15.	Print the Academic Plan Progress report.	Portal > Academic Planner
Counselor		
16.	View the student's approved course plan. Work with the student to establish a course plan for the coming year of enrollment. • If a student cannot be scheduled into a desired course, courses marked as alternate can be added to the course plan. • Students who transfer to another school in the district and have already planned courses can modify their course plan to fit the courses at the new school. • Courses can be planned for students enrolling after the start of the school year.	Student Information > Academic Planning > Course Plan
17.	Calculate the student's on-track status.	Program Admin > Course Plan Admin
18.	Generate the following reports to assist in the management of student academic plans: • Academic Plan Status Report • Academic Plan Progress Batch • Course Plan Batch	Program Admin > Reports > Academic Plan Status Report Program Admin > Reports > Academic Plan Progress Batch Program Admin > Reports > Course Plan Batch
Teacher		
19.	Enter Student Course Recommendations.	Campus Instruction > Student Course Recommendations
Counselor		

Task		Campus Location
20.	Prepare for scheduling students into courses for the next school year by: • Review graduation and academic programs; modify as needed. • Review the Checklist for Scheduling • Lock course plans • Create Course Requests • Generate the Course Projections Report	Program Admin > Programs Program Admin > Course Plan Admin Scheduling > Reports > Course Projections
21.	Post diplomas for graduating students.	Program Admin > Course Plan Admin
22.	Reset course plans for future changes by: • Clearing the Approved by parent/legal guardian checkbox • Unlocking course plans	Program Admin > Course Plan Admin

Ad hoc information for academic planning

Demographics information is available in the Query Wizard for **Student Data Type** filters. Fields can be selected from the following locations:

- Student > Learner > **Programs/Flags:** This section includes fields related to Programs (those not related to Graduation or Academic Programs) and Flags assigned to the student.
- Student > Learner > Programs/Flags > **Graduation**: This section includes fields related to assigned **Graduation Programs**.
- Student > Learner > Programs/Flags > **Academic Program**: This section includes fields related to assigned **Academic Programs** (formerly Career Tech Programs).



Graduation and Academic Program Ad hoc fields are used to create filters for extracting related data.