Activity Roster [.2323 - .2351]

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Tool Search: Activity Monitor

The Activity Roster provides a detailed view of the students who have registered for an activity and allows you to manage the roster for current and upcoming activities. For each student on a roster, you can see the student's name, ID, and grade, as well as whether their payment and required forms are complete. The Activity Roster is accessed by clicking the **Roster** button for an activity on the Activity Monitor or Activity Dashboard tool.

What can I do?	What do I need to know?
- Mark Payments and Forms as Complete - Add Students to the Roster - Remove Students from the Roster - View a Student's Emergency Contacts - Manage Form Participants and Details - Request an eSignature - Reassign a Form for eSignature - Override an eSignature Request - Create a New Contact Log - Lock/Complete a Form - Post to Course Section - Manual Post to Course Section - Auto-Post to Course Section	- About the Activity Roster - Activity Roster Filter Fields for Ad hoc Reporting - About Field Trip Rosters

About the Activity Roster

The Activity Roster provides a detailed view of the students who have registered for an activity. You can see the student's name, ID, and grade, as well as whether their payment and required forms are complete. You can also see the activity option that was purchased. If the student was manually added to the roster, the Option Purchased column will default to **Manual**. Leaving Option Purchased as Manual will not affect any inventory limits.

▸ Click here to expand...

Students are added to the Activity Roster and the **Total Students** field is incremented as purchases for Activity or Athletic activity types are made through the School Store. Field Trip Rosters are created differently. See the following About Field Trip Rosters topic for more information.

> Once a student has registered for an activity, that activity no longer appears for them in the School Store.

Tips

- Click the **Export** button to save a copy of the roster.
  - The Excel file includes a column for each required and/or optional form. Forms are marked as TRUE when they are complete and FALSE when they are incomplete. Required forms include an asterisk (*) in front of the form name.
- Use the **Registration Status** dropdown list to limit which registrations display. Registration

Status options include the following:

- All
- Required Registration Complete
- **Required Forms**: Action Needed
- **Required Forms**: Awaiting Signature
- **Optional Forms**: Complete
- **Optional Forms**: Review Needed

About Field Trip Rosters

When purchases are made in the School Store for Activity or Athletic activity types, Campus increments the **Total Students** field. This does not occur for Field Trip activities. Instead, Campus displays the number of students returning from the Ad Hoc filter associated with the field trip. If you use the Query Wizard or a Pass-Through SQL Query filter, Campus updates the number of Total Students based on the filter's results. If you use the Selection Editor to create your filter, the number of Total Students does not change.

Mark Payments and Forms as Complete

As purchases are made through the Campus School Store the **Payment Complete** number will increment. This number will also increment when you manually mark the **Payment Complete** checkbox.

The **Payment Complete** and **Required Forms Complete** checkboxes can be manually marked as complete or can be automatically marked complete if the **Registration Confirmation Process** is turned ON.

Process	Description
Manual	To manually mark the **Payment Complete** or **Form Complete** checkbox, click the **Roster** button to display the Activity Roster screen. From here you can mark the necessary checkboxes. Click **Save** to complete your changes.

Process	Description
Automatic	If the **Registration Confirmation Process** is turned ON the **Payment Complete**, **Required Forms Complete**, and **Registration Confirmed** columns are automatically marked IF the payment is complete, the parent and/or student signed any required forms that require an e-signature, and the required forms are locked.

> If there are *optional* forms missing signatures, the Registration Confirmation Process continues and marks the **Registration Confirmed** checkbox.

Add Students to the Roster

You can manually add students to an activity roster if they are enrolled in the school associated with the activity. This feature is useful if you would like to allow a student to participate, but they do not match the criteria in the Ad Hoc filter selected on the activity.

Students with past and future enrollments in addition to current enrollments can be manually added to an activity. When the **Add Individual Students** dropdown list is selected, Campus checks for enrollments 90 days in the past based on the **Registration Open Date** of the activity and enrollments 90 days in the future based on the **Activity End Date**.

The example below shows the activity's registration open date is 08/05/2022. Students with a past enrollment end date of 05/07/2022 (08/05/2022 minus 90 days) or later can be manually added to this activity.

Example Past Enrollment: Student Can be Added Manually

The next example shows the activity's end date is 08/12/2022. Students with a future enrollment date of 11/10/2022 (08/12/2022 plus 90 days) or earlier can be manually added to the activity. This student's enrollment date is *after* the 90 days, so his name does **NOT** appear on the Add Individual Students dropdown list.

Example Future Enrollment: Student Cannot be Added Manually

When you manually add a student to the roster, all forms must be reviewed and if applicable sent for eSignature. First, district staff must fill out any fields on the form that are marked for staff and then the form can be filled out in the Campus Student and/or Campus Parent Portal. (Fields can be marked for staff when you define rules for an interactive form. See the Custom Forms article for more information.) The only exception to this process is if you manually mark the *Payment Complete* checkbox and do NOT open the forms. In this scenario, district staff do not need to fill out any fields on the form that are also marked for portal users or request an eSignature. The exception only applies if the Activity Registration viewing tool is enabled in the Display Options.

District staff can also override the eSignature in the Activity Roster as needed. See the following topic on this page for more information: Manage Form Participants and Details.

1. Click the **Roster** button on the activity.
   Result
   The Activity Roster displays.
2. Type the student's name in the **Add Individual Students** field and select the student when their name displays.
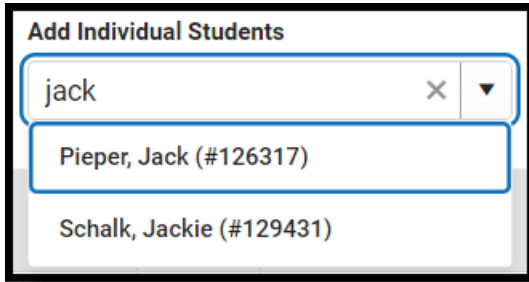
Result

Campus adds the student with the status of "Pending Save" and they appear at the top of the roster until saved.

3. Mark the **Payment Complete** and/or **Required Forms Complete** checkboxes. *Optional*
4. Choose the **Option Purchased** from the drop-down. *Optional*
   Note: If the Option Purchased is set to Manual, it will not affect inventory limits.
5. Click **Save** to save your changes.

Remove Students from the Roster

You can manually remove students from the roster if the student was manually added and has not paid. If the Payment Complete checkbox is not marked, the student can be removed.

1. Click the **Roster** button on the activity.
   Result

   The Activity Roster displays.
2. Mark the checkbox in the **Select** column for the student(s) you want to remove.

3. Click the **Remove** button.
   Result

   Campus remove the student from the table.
4. Click **Save** to save your changes.

View a Student's Emergency Contacts

Emergency contact information for each student is available on the Roster screen. Click the button ![contact icon] next to the student's name to quickly access contact information that is already stored in Campus.

Manage Form Participants and Details

Request an eSignature | Reassign a Form for eSignature | Override an eSignature Request | Create a New Contact Log | Lock/Complete a Form | Creating a Form Using Quick Form Fill

Activity Registration supports interactive custom forms. Interactive forms allow users to enter data directly into the PDF and electronically sign when registering for an activity. You can use the Activity Roster to review these forms and ensure everything is filled out correctly and/or signed.

When you manually add a student to the roster, all forms must be reviewed and if applicable sent for eSignature. Forms can then be filled out in the Campus Student and/or Campus Parent Portal in the Documents tool. District staff can also fill out forms (except for the eSignature) in the Activity Roster if necessary.

Request an eSignature

After you manually add a student to a roster and complete forms as necessary, you can request an eSignature from parent/guardians and students when the form requires an eSignature. Requesting eSignatures makes the form read-only; i.e., you cannot make additional changes.

1. Select the form that requires an eSignature.
   Result
   The Form displays.
2. Click **Review Participants**.
   Result
   The Form Details panel displays.
3. Click the **Request eSignatures** button.
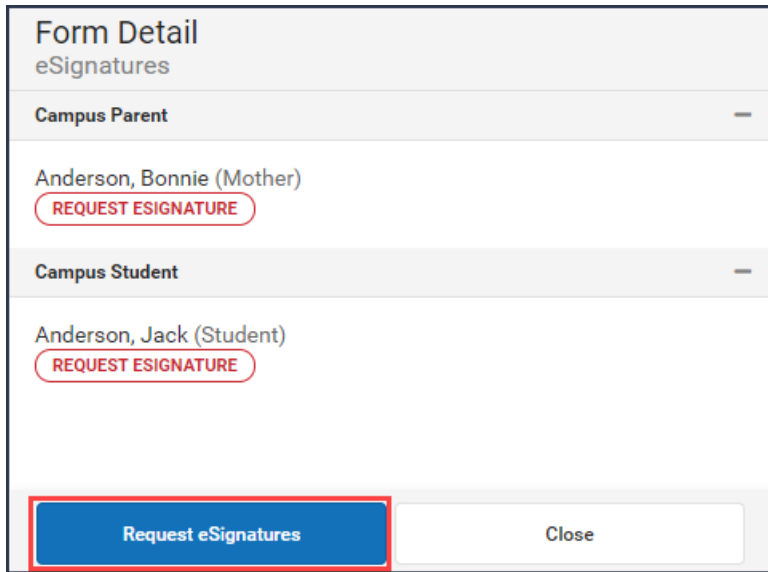
Result

A confirmation message displays.

4. Click **Request eSignatures**.

Result

A confirmation message displays and the Form Detail panel closes. The eSignature statuses change to **Pending** on the Form Detail panel. Forms can then be filled out in the Campus Student and/or Campus Parent Portal in the Documents tool.

Reassign a Form for eSignature
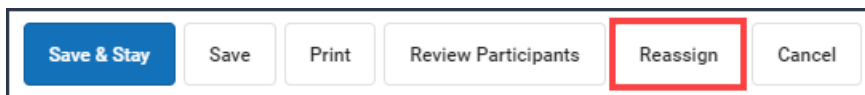
This option allows you to reassign a custom form to a user who did not have an active Campus Student or Campus Parent account when the student was registered for an activity.

1. Select the form that requires a signature.

Result

The form displays in a side panel.

2. Click the **Reassign** button.

Result

An error message displays if the users does not have an active portal account. Otherwise, a confirmation message displays and the user can go to the Documents tool in the portal and complete the form.

Override an eSignature Request

District staff cannot sign for students/parents; however, the eSignature can be overridden. As a best practice, create a new contact log to document any communication that resulted in overriding the eSignature.

▸ Click here to expand...

1. Select the form that requires a signature.
   It will say **Action Required** next to the form.

Select	Student	Student Grade	Payment Complete	Required Forms Complete
☐	Abegg, Dylan (#171900001) 🖼	11	☑	☐
	Required Forms * Activity Registration w/e-signature ACTION REQUIRED			

   Result
   The form displays.

2. Click **Review Participants**.
   Result
   The Form Details panel displays.

3. Select the checkbox next to the person's name and then enter Comments explaining why you are overriding the eSignature.

   Form Detail
   eSignatures

   Campus Parent   —

   Abegg, Donald (Father)
   SIGNED

   Campus Student   —

   Abegg, Dylan (Student)
   PENDING

   Override eSignature Request   —

   Select Person(s) *
   ☑ Abegg, Dylan (Student)
   Override Comment *

   Student will not be attending events off campus.

   Save Override

4. Click **Save Override**.
   Result
   A confirmation message displays as the status changes to Overridden.

Create a New Contact Log

The Activity Roster allows you to record an communication you have with participants by phone, mail, email or in person.

1. Select the form where you want to add a Contact Log.
   Result
   The form displays.
2. Click **Review Participants.**
   Result
   The Form Details displays.

Form Detail
eSignatures

Create New Contact Log —

Select Person(s) *
- ☑ Abegg, Donald (Father)
- ☑ Cardinal, Peggy (Student)

Date *   **Time** *

11/12/2020 🗓   3:27 PM 🕐

Contact Options *

3: email ▾

Description *

Sent email regarding required signatures.

Save Contact Log

Close

3. Mark the checkboxes next to the appropriate person(s).
4. Adjust the Date and Time as necessary.
5. Select one of the following **Contact Options**: *1:Telephone, 2: U.S. Mail, 3: email, 4: In Person*.
6. Enter a **Description**.
7. Click **Save Contact Log**.
   Result
   Campus creates a contact log for each person you selected.

Form Detail
eSignatures

Contact Details —

Donald Abegg (Father)
11/12/2020 3:27 PM
Contact Option: 4: In Person
Description
Sent email regarding required signatures.

Peggy Cardinal (Student)
11/12/2020 3:27 PM
Contact Option: 4: In Person
Description
Sent email regarding required signatures.

Lock/Complete a Form

Required forms display the status **Action Required** until the form is locked. (Forms for manually added students do not display that status until the form is first opened.) A locked form indicates no additional changes can be made.

Locking and completing forms can be done manually or automatically.

> If a form is interactive and it is marked as Required, then the **Complete** button appears. If the form is **NOT** interactive, but it is marked as Required, the **Lock** button appears. Both buttons perform the same function.

Manually Lock/Complete a Form

Manually locking and completing forms gives you the chance to review a form and ensure the necessary information has been supplied and/or it has been signed.

1. Select the form that you want to Lock. It will say **Action Required** next to the form.
   Result
   The form displays.
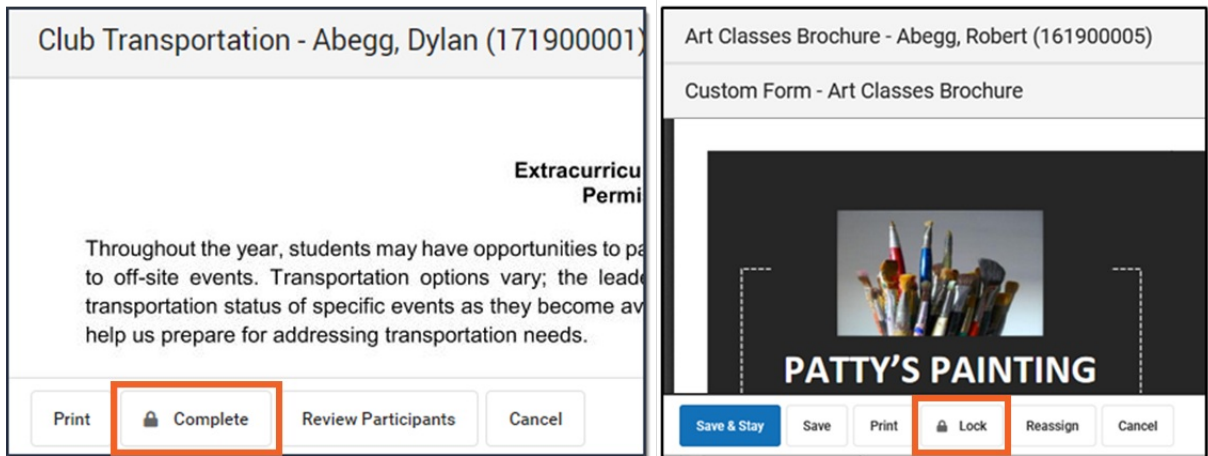
2. Click the **Complete** or **Lock** button.
   Result
   The Complete Form or Lock Form confirmation message displays.
3. Click **Complete** or **Lock**.
   Result
   A confirmation message displays saying the form is locked and the form's status changes to *Complete*.

Automatically Lock/Complete a Form

Locking and completing forms is done automatically when you slide the **Auto Form Lock** toggle to **ON**. When a form has been completed and/or signed, the form is automatically locked and marked as Complete; the form does not require manual completion.
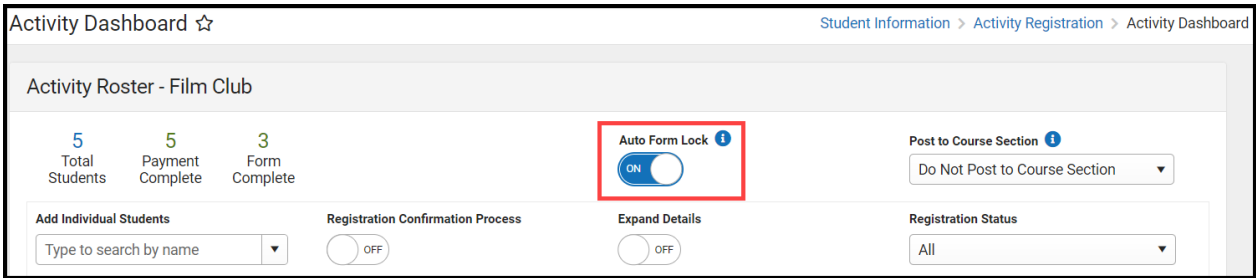
Creating a Form Using Quick Form Fill

The Quick Form Fill tool allows for custom forms in Activity Registrations to be populated with ad hoc data that is selected for the individual form fields. This tool will only appear when the data returned for the ad hoc provides multiple results and therefore needs input to decide which value to populate into the field. For example, a course name ad hoc populated into an Activity Registration form field will likely have multiple values returned. The Quick Form Fill tool will prompt for the correct course to populate on opening of the form. The Quick Form Fill tool is also available for parents/students to use in the School Store.
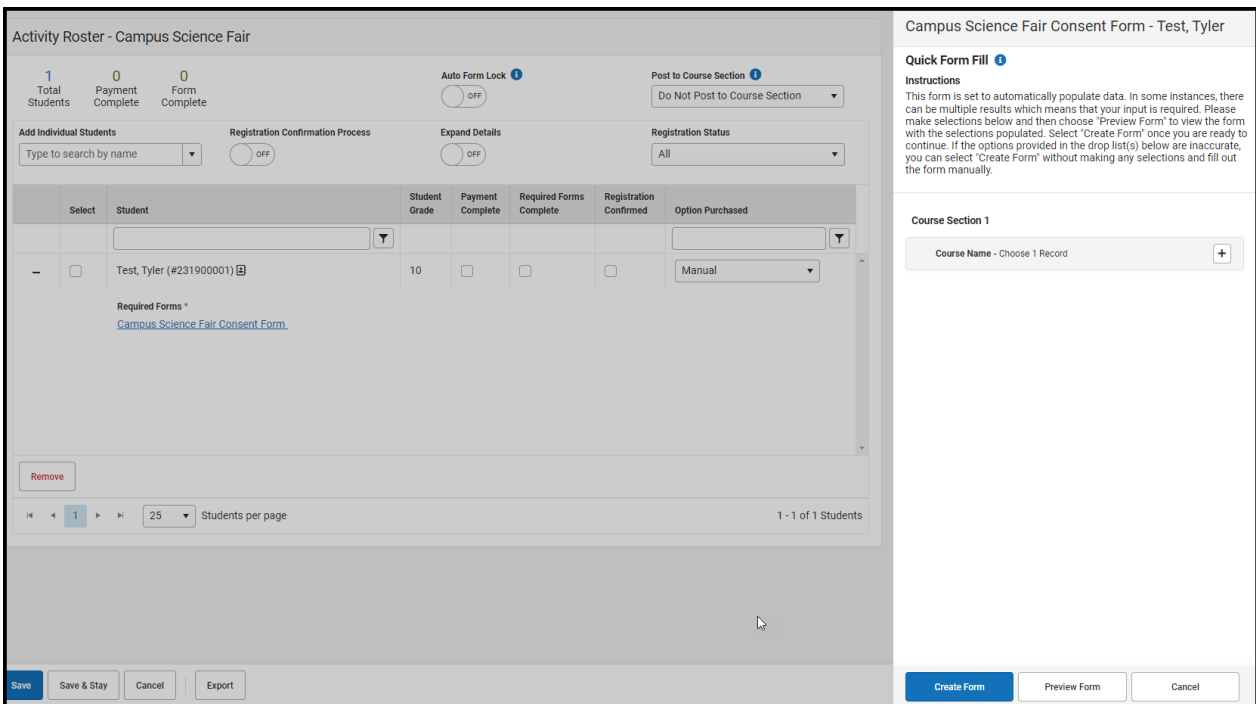
1. Select the Expand Details (+) of the student whose form you wish to fill in.
2. Select a form from the Required Forms.
3. Select from the Quick Form Fill options available.
4. Preview the form using the Preview Form button. It will appear in a new tab.
5. Click Create Form.

Post to Course Section

The Post to Course Section feature allows you to associate an activity with a Course and Section and update the roster once the activity is in one of these statuses:

- Registration Open
- Registration Closed
- Active - Registration Open
- Active - Registration Closed
- Ready
- Approved

Posting to a Course Section is done for activities appearing on the Current or Upcoming tabs of the Activity Monitor.

Posting registered students to a Course Section allows you to track attendance using Campus Instruction and puts the activity on the student's schedule.

Only students who have the Registration Confirmed checkbox marked can be added to a Course Section roster. The students must have just one primary enrollment.

This process only adds students to the Course Section Roster. If you need to remove a student from this roster, you must remove them manually using the Section Roster Setup tool.

Posting to a Course Section can be done manually or automatically.

Manual Post to Course Section

Students are manually added to a section roster by selecting Manual Post to Course Section from the Post to Course Section dropdown list.

If students are added to the Activity Registration roster after the initial section roster is updated, you can complete the following steps again and Campus will update the section roster with the newly added students.

1. Once the activity has the proper status, choose **Manual Post to Course Section** from the Post to Course Section dropdown list.
   Result
   The Post to Course Section area displays.
   ▶ Click here to expand…
2. Select the **Calendar**, **Course** and **Section**.
3. Click the **Preview Section Roster** button.
   A preview message displays.

Preview Section Roster ✕

Roster Check Complete.

[**Update Section Roster**] [Cancel Roster Update]
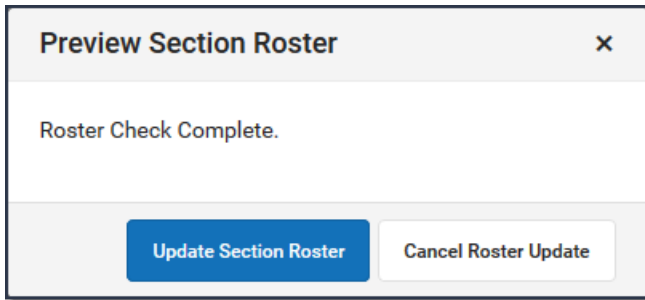
If there are students who cannot be added to the roster, their names display on the preview message. This could include students who do not have a primary enrollment. After reviewing these students and correcting any issues, you can complete these steps again to append these students to the section roster.

▸ Click here to expand...

4. Click the **Update Section Roster** button.
   Result
   A confirmation message displays.

Confirm Roster Update ✕

Please confirm the section roster update as this change cannot be undone.

[**Confirm Update**] [Cancel]
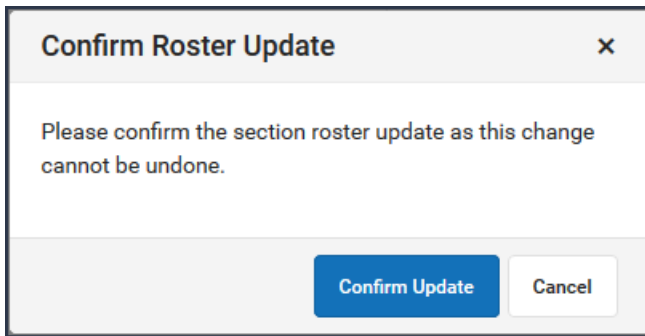
5. Click the **Confirm Update** button.
   Result
   Campus updates the Section Roster.

   ▸ Click here to expand...

Auto-Post to Course Section

If the option Auto-Post to Course Section is selected, students are automatically added to the section as soon as the Registration Confirmed checkbox is marked and the activity has been saved.

It may take up to a minute after the Registration Confirmed checkbox is marked AND the roster has been saved before the student appears in the section roster.

When Auto-Post to Course Section is selected, the Registration Confirmation Process toggle is automatically turned on. The Registration Confirmed checkbox will be marked for those participants who have made payment and have all forms completed (the Payment Complete and Required Forms Complete checkboxes will be marked).

1. Once the activity has the proper status, choose **Auto-Post to Course Section** from the Post to Course Section dropdown list.
   Result
   The Registration Confirmation Process toggle is turned ON and the Post to Course Section area displays.
   ▸ Click here to expand...
2. Select the **Calendar**, **Course** and **Section**.
3. Click the **Save** or **Save & Stay** button.
   Result
   Students who already have the **Registration Confirmed** checkbox marked are automatically placed in the section roster.
   As students are added to the activity and their registrations are confirmed, they will be added to the section roster.

Preview Section Roster

If students' names appear on the preview message after clicking the **Preview Section Roster** button, it means there is an issue with their enrollment, or their registration has not been confirmed.

Issue	How do I fix it?
The registration has not been confirmed.	1. Ensure payment has been made for the student and the **Payment Complete** checkbox is marked. 2. The forms for the student have a status of **Completed** and the **Required Forms Complete** checkbox is marked. The **Registration Confirmed** checkbox will be marked automatically if **Auto-Post to Course Section** is selected from the **Post to Course Section** dropdown list.

A student does not have a primary enrollment or has two or more primary enrollments. The Warning symbol appears on the **Roster** button in Activity Monitor...
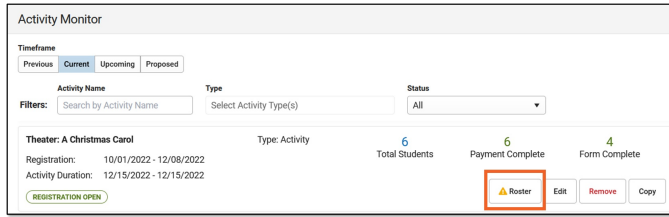
...and a warning message appears after clicking the **Roster** button.
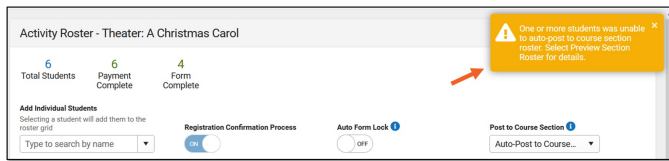
1. Resolve the enrollment issue.
2. Choose the Activity Monitor tool and click the **Roster** button for the activity with the warning.
3. If the **Payment Complete** and the **Required Forms Complete** checkboxes are marked, the student will **NOT** be automatically appended to the section roster even though Auto-Post to Course Section is selected.
4. Scroll down to the **Post to Course Section** area. Click the **Preview Section Roster** button, click **Update Section Roster** and then click **Confirm Update.**
5. Save.

After all enrollment issues have been resolved and the students have been posted manually, the warning messages no longer display.

Activity Roster Filter Fields for Ad hoc Reporting

The Ad hoc Reporting tools allow users to create custom queries and reports on various types of information stored within the Campus database. The following Activity Roster fields are available for creating queries with the Filter Data Type of Student (Student > Activity Registration > Roster)

Roster Data	Ad hoc Field Name
Person ID	actRegRoster.personID
Activity Type	actRegRoster.activityType
Activity Name	actRegRoster.activityName
Item Name	actRegRoster.itemName
Activity Start	actRegRoster.activityStart
Activity End	actRegRoster.activityEnd
Registration Start	actRegRoster.regStart
Registration End	actRegRoster.regEnd

Roster Data	Ad hoc Field Name
Sign Up Date	actRegRoster.signUpDate
Payment Complete	actRegRoster.paymentComplete
Forms Complete	actRegRoster.formsComplete
Registration Complete	actRegRoster.registrationComplete
Posted to Course Section	actRegRoster.postedToCourseSection

Previous Version

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