ProgressBook StudentInformation Student Homeroom Guide

StudentInformation

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(This document is current for v20.0.0 or later.)

Change Log

The following Change Log explains by Product Version, Heading, Page, and Reason where changes in the *ProgressBook StudentInformation Student Homeroom Guide* have been made.

Product Version	Heading	Page	Reason
20.0.0	Entire Guide	N/A	Updated images and text to reflect style guide. Reorganized information.

Table of Contents

Overview

Homerooms provide a consistent assigned meeting point for students as well as a way to group students for the purposes of distributing school information and report cards, taking attendance, and other functions. You can use homerooms in StudentInformation to include students on and sort reports.

Refer to the appropriate section as follows:

- For information on setting up homerooms in StudentInformation, see *"Setting Up Homerooms."*
- For information on assigning students to homerooms, see *"Assigning Homerooms."*
- For information on troubleshooting issues, see *"Troubleshooting Homeroom Assignments."*
- For information on homeroom-related reports, see *"Reports."*

Setting Up Homerooms

To assign students to homerooms, schedule terms must be linked to the corresponding homeroom terms (see *"Homeroom Terms"*).

Once all schedule terms have been linked to their respective homeroom terms, you can set up the homerooms (see *"Homeroom Maintenance"*).

After all homerooms are configured, you can assign students to them (see *"Assigning Homerooms"*).

Homeroom Terms

Navigation: StudentInformation > Management > School Administration > Scheduling Administration > Initialization > Homeroom Terms

To assign students to homerooms, all schedule terms must be linked to the corresponding homeroom terms.

⚠️ **Caution:** *If the schedule terms are not linked to the homeroom terms, any homerooms that have already been assigned to unlinked homeroom terms must be deleted and then reassigned after you link the schedule terms.*

You can add a new homeroom term and link it to one or more schedule terms, or you can edit an existing homeroom term and verify that the correct schedule terms are linked to it.

1. To add a new homeroom term, click **Add Homeroom Term**; otherwise, click 🖉 to verify that the homeroom term has the correct schedule term(s) linked to it.

The add/edit version of the screen displays.

2. If you are adding a homeroom term, complete the following steps:

   a. In the Code field, enter a homeroom code of up to 8 alphanumeric characters.

   b. In the **Name** field, enter a name for the homeroom term.

   c. (Optional) In the **Description** field, enter a description for the homeroom.

   d. In the **Schedule Terms** grid, in the **Include** column, select the checkbox for each schedule term to which the homeroom term should be linked.

   e. Click **Save**. Or, to add another homeroom term, click **Save and New** and repeat *step a* through *step e*.

3. If you are editing a homeroom term, verify that the correct schedule terms are linked to it:

   a. In the **Schedule Terms** grid, verify that the correct schedule terms are selected in the **Include** column. For example, if the homeroom term is only for 1st semester, ensure that all schedule terms that coincide with 1st semester are selected.

   b. Click **Save**.

4. Review the information on the **Homeroom Terms Maintenance** screen, then click **Save Changes**.

Homeroom Maintenance

Navigation: StudentInformation > Management > School Administration > School Building Administration > Homerooms

On this screen, you can add, edit, and deactivate homerooms by building. Students can be assigned only to active homerooms.

This screen has standard add record, edit record, and deactivate record controls.

Add Homeroom – Click to add a new homeroom (see *"Adding Homerooms"*).

Filter by HR Term – Select a homeroom term from the drop-down list to display only the homerooms for the selected term.

🗑 – Click to deactivate a homeroom.

✏ – Click to edit a homeroom.

👤✗ – Click to remove all assigned students from a homeroom.

🟢 – Indicates that a homeroom is active.

◯ – Indicates that a homeroom is inactive.

Sorting – You can sort any column (**Homeroom**, **HR Term**, **Teacher**, **Room**, **Capacity**, **Remaining**, **Counselor**, **Active**) in ascending or descending order by clicking the column header.

Show Active Only – Deselect this checkbox to view both active and inactive homerooms.

Adding Homerooms

> *Note: You can set up homerooms only at the building level.*

1. On the **Homeroom Maintenance** screen, click **Add Homeroom**.

The add/edit version of the screen displays.

2. In the **Homeroom Term** drop-down list, select the term for this homeroom (full year, fall, spring, etc.). In some cases, the selection here can let students have more than one homeroom per year.

3. In the **Code** field, enter a homeroom code of up to 4 alphanumeric characters.

4. In the **Name** field, enter a name for the new homeroom.

5. In the **Location** drop-down list, select the room/location of the homeroom.

6. In the **Teacher** drop-down list, select the teacher for this homeroom.

7. In the **Capacity** drop-down list, enter the number of students this homeroom can accommodate.

8. (Optional) In the **Counselor** drop-down list, select the counselor you want to assign to the students in this homeroom.

9. (Optional) If you want to define which grade levels are applicable for the new homeroom, in the **Grade Levels** section **Available** dual listbox on the left, select the applicable grade levels, then click ➡ to move them to the **Selected** dual listbox on the right. (You can hold down CTRL or SHIFT to make multiple selections and use any of the arrow icons to move grades between the 2 dual listboxes.)

10. (Optional) If you do not want this homeroom to be active at this point, deselect the **Is Active** checkbox.

    Note: You cannot assign students to inactive homerooms.

11. Click **Save**. Or, to continue adding homerooms, click **Save and New**.

    A confirmation message displays, and the new homeroom now displays in the grid.

Assigning Homerooms

You can assign students to homerooms in any of the following ways:

- To assign an individual student to a homeroom, see *"Assigning Individual Students to Homerooms."*
- To bulk assign students to a single homeroom, see *"Bulk Assigning Students."*
- To bulk assign students to multiple homerooms, see *"Bulk Assigning Students."*
- To delete homeroom assignments, see *"Deleting Homeroom Assignments."*

If you experience issues assigning homerooms, refer to *"Troubleshooting Homeroom Assignments."*

Assigning Individual Students to Homerooms

You can assign individual students to homerooms in the following ways:

- On the **Student Homeroom Assignments** screen (see *"Student Homeroom Assignments"*)
- On the **Edit Student Profile** screen **Additional** tab (see *"Edit Student Profile"*)

Student Homeroom Assignments

Navigation: StudentInformation > SIS > Student > Homeroom Assignment

1. On the **Student Homeroom Assignments** screen, with a student in context, in the grid, complete one of the following:

   - In the drop-down list, select the homeroom to which you want to assign this student.

     *Note: You can deselect the **Display grade appropriate homerooms only** checkbox if you wish to assign the student a homeroom that is not grade appropriate.*

     Note: If you have homerooms set up by term, you can assign students to homerooms by term. Refer to the ProgressBook StudentInformation Scheduling Guide *for more information.*

   - Click **Auto-Assign** to assign the homeroom randomly based on grade level and available capacity.

2. Click **Save**.

A confirmation message displays, and the student's homeroom displays in the student context area of the banner.

3. (Optional) Click **Edit Student Profile** to view and/or make changes to the student's profile.

Edit Student Profile

Navigation: StudentInformation > SIS > Student > Edit Student Profile

1. On the **Edit Student Profile** screen, with a student in context, in the grid, complete one of the following:

   • In the drop-down list, select the homeroom to which you want to assign this student.

   Note: *If you have homerooms set up by term, you can assign students to homeroom by terms. Refer to the* ProgressBook StudentInformation Scheduling Guide *for more information.*

> • Click **Auto-Assign** to assign the homeroom randomly based on grade level and available capacity.

2. Click **Save**.

   A confirmation message displays, and the student's homeroom displays in the student context area of the banner.

Bulk Assigning Students

You can assign multiple students to homerooms at once (bulk assign) in the following ways:

> • To bulk assign students to a single homeroom, see *"Bulk Assigning Students to a Single Homeroom."*
>
> • To bulk assign students to multiple homerooms, see *"Bulk Assigning Students to Multiple Homerooms."*

Bulk Assigning Students to a Single Homeroom

Navigation: StudentInformation > Management > Ad-Hoc Updates > Homeroom Bulk Assignment > Single Homeroom tab

1. On the **Homeroom Bulk Assignment** screen **Single Homeroom** tab, in the **Homeroom Term** drop-down list, select the homeroom term for which you wish to assign the homeroom.

2. In the **Homeroom** drop-down list, select the homeroom to which you wish to assign students.

3. (Optional) Deselect the **Enforce Homeroom Grade Level** checkbox if you do not want to limit your **Homeroom** selection to homerooms that are grade appropriate for the student.

Once you select a homeroom, the student search section displays.

4. You can search for students using one of the following options:

   • **Search Criteria** – Enter and/or select all relevant search criteria.

     *Note: Select the checkbox beside the **Last Name** and/or **First Name** fields to perform a wildcard search for the content entered; e.g., entering "sa" in the **First Name** field and selecting the checkbox returns "Sam," "Sally," and "Samantha." If you do not select the checkbox(es), a strict match search is performed instead, and names based on the partial information entered are not returned.*

   • **Student IDs** – Enter student ID numbers separated by a comma.

   • **Homeroom** – In the **Homeroom Assignment** drop-down list, select the homeroom from which you wish to reassign students.

     Note: You can use the select students by homeroom method to move students from one homeroom to another in the same term or to assign a second homeroom for a different term.

5. (Optional) In the **Sort Students By** drop-down list, you can select the order in which the student search results display (defaults to **Alphabetical**).

6. (Optional) Deselect the **Group Students By Grade Level** checkbox to display student search results solely based on the **Sort Students By** selection.

7. (Optional) Select the **Students Selected by Default** checkbox to automatically select all students in the search results.

8. Click **Preview Students** to review the students you are adding to the selected homeroom.

The students who meet the search criteria display.

9. (Optional) Select and deselect students as necessary, keeping in mind the **Homeroom Capacity**.

10. Click **Assign Students** to assign the selected students to the selected homeroom.

If the assignment is successful, a confirmation message displays.

*Note: If you assigned enough students to surpass the homeroom's capacity, a warning message displays to indicate that the homeroom will be overfilled if you proceed. If you want to overfill the homeroom, click **Ok**. Otherwise, click **Cancel**, modify your search criteria, and then try again.*

*Note: If there are any homeroom conflicts, a message displays on the **Results** tab to indicate that not all students were assigned, and a grid containing the affected student(s) displays.*

Bulk Assigning Students to Multiple Homerooms

Navigation: StudentInformation > Management > Ad-Hoc Updates > Homeroom Bulk Assignment > Multiple Homeroom tab

1. On the **Multiple Homerooms** tab, in the **Homeroom Term** drop-down list, select the homeroom term for which you wish to assign the homerooms.

2. In the **Available Homerooms** dual listbox, select the homerooms to which you want to assign students, then click ➡ to move them to the **Selected Homerooms** dual listbox on the right. (You can hold down CTRL or SHIFT to make multiple selections and use any of the arrow icons to move homerooms between the 2 dual listboxes.)

3. In the student search section, you can search for students using one of the following options:

   - **Search Criteria** – Enter and/or select all relevant search criteria.

     *Note: Select the checkbox beside the **Last Name** and/or **First Name** fields to perform a wildcard search for the content entered; e.g., entering "sa" in the **First Name** field and selecting the checkbox returns "Sam," "Sally," and "Samantha." If you do not select the checkbox(es), a strict match search is performed instead, and names based on the partial information entered are not returned.*

   - **Student IDs** – Enter student ID numbers separated by a comma.
   - **Class Period** – Select the **Course Term**, **Rotation Day** (typically **Monday**), and **Period** (typically 1st) to which you would like to assign the homeroom(s).

4. (Optional) In the **Sort Students By** drop-down list, select the order in which the student search results display (defaults to **Alphabetical**).

5. (Optional) Deselect the **Group Students By Grade Level** checkbox to display student search results solely based on the **Sort Students By** selection.

6. Click **Assign Students** to assign the students who meet the selected criteria to the selected homerooms (up to their capacity).

    Note: You cannot preview the students whom you are assigning to multiple homerooms. Once you click **Assign Students***, all students meeting your criteria are assigned to homerooms up to their capacity.*

The **Results** tab displays with a summary message that lists the number of students who matched your search criteria, the number of successful homeroom assignments made, and any conflicts. The students who match your selected criteria display in a grid, and the **Assigned** checkbox is selected in the row of each student who was successfully assigned a homeroom.

Deleting Homeroom Assignments

You can delete students from homerooms in the following ways:

- To remove all students from a homeroom, see *"Homeroom Maintenance."*
- To remove individual students from a homeroom, see *"Removing Individual Students from a Homeroom."*

Removing Individual Students from a Homeroom

Navigation: StudentInformation > Management > Ad-Hoc Updates > Homeroom Bulk Assignment > Single Homeroom tab

1. On the **Single Homeroom** tab, in the **Homeroom Term** drop-down list, select the homeroom term for which you wish to remove students.

2. In the **Homeroom** drop-down list, select the homeroom from which you wish to remove students.

   If there are students already assigned to the selected homeroom, the grid of existing students displays.

3. In the row of each student you want to remove from the homeroom, click 🗑 .

*Note: You can also click **Remove All Students** to remove all assigned students from the selected homeroom.*

The student(s) no longer displays in the list, and updated numbers for room capacity display.

Troubleshooting Homeroom Assignments

Issue	Cause	Solution
Student homeroom assignments do not display in the student context area of the banne	Homeroom terms were not properly linked to the schedule terms at the time the homerooms were assigned.	Clear all homeroom assignments for the homeroom term (see *"Homeroom Maintenance"*). Edit the homeroom term and link the schedule terms to the homeroom term (see *"Homeroom Terms"*), and then reassign homeroom (see *"Assigning Homerooms"*).
	First/last day of school is not an actual **School Day**.	Update the first/last day of school to an actual **School Day**.

Issue	Cause	Solution
When adding a new homeroom, the room I wish to select does not display in the **Location** drop-down list.	When the room was created, the **Is Homeroom** checkbox was not selected.	On the **Room/Location Maintenance** screen, edit the room and select the **Is Homeroom** checkbox.
I am attempting to assign homerooms by class period but it is not working. No one is assigned a homeroom.	The location of the course and the location of the homeroom must match.	Edit either the course section or the homeroom to change the location.

Reports

The following reports are available in StudentInformation to help you manage your student homeroom assignments:

- *"Administrative Homeroom List Detail Report (R201-A)"*
- *"Administrative Homeroom List Summary Report (R201-B)"*

For information on running reports, see the *ProgressBook StudentInformation Getting Started Guide*.

Administrative Homeroom List Detail Report (R201-A)

Navigation: StudentInformation > SIS > School > Student Reports > Administrative Homeroom Detail (R201-A)

This report generates a detailed list of students in each homeroom. You can run this report for a single homeroom, multiple homerooms, or all homerooms in a school. You can select which information to include, such as name, address, phone number, birthdate, and other student data. You can also print address labels using the data in this report.

Report: R201A *Printed Wed, Apr 29, 2020, 3:25 PM*					**Test High School** **2019-2020**	
					Administrative Homeroom List Detail	

HOMEROOM 09HR   TEACHER: Alecia Gillespie   LOCATION: Office

Stud ID	Student Name	Birth Date	GR	GN	Telephone	Address
246858108	Adams, Daniele	02/17/2004	09	F	(937) 555-2080	116 South Cowley Way, Test, OH 12345-2501
310435007	Ali, Angela	07/14/2005	09	F	(114) 555-2636	7190 White Northpointe Avenue Test, OH 12345-9105
557167007	Alvarado, Shannan	02/18/2005	09	F	(147) 555-1560	6938 2nd Eastpointe Drive, Test, OH 12345
685318715	Burnett, Pamela	07/29/2004	09	F	(607) 555-4622	4717 Green Oak, Test, OH 12345-9791
569346122	Cuevas, Shanda	04/06/2005	09	F	(514) 555-5142	1387 East Lafayette, Test, OH 12345-9577
656865178	Fuller, Christel	06/13/2005	09	F	(583) 555-4964	3526 Old Westpointe, Test, OH 12345-3858
832019148	Griffin, Ana	05/02/2005	09	F	(511) 555-7088	9323 Green Northpointe, Test, OH 12345-9728
739279778	Harper, Meggan	06/26/2005	09	F	(325) 555-7807	5043 1st Oak Avenue, Test, OH 12345-9728

NUMBER OF STUDENTS: 8   (Males: 0, Females: 8)

Administrative Homeroom List Summary Report (R201-B)

Navigation: StudentInformation > SIS > School > Student Reports > Administrative Homeroom Summary (R201-B)

This is a summary report that lists the number of students, the teacher, and the grade level for each homeroom. You can run this report for a single homeroom, multiple homerooms, or all homerooms in a school. You can also print address labels using the data in this report.

Report: R201B				**Test High School**	
Printed Wed, Apr 29, 2020, 3:33 PM				**2019-2020**	
				Administrative Homeroom List Summary	
HOMEROOM	TEACHER NAME	ID	ROOM	GRADE	No Of Students
09HR	Alecia Gillespie	LONG7096	Office	09	8
10HR	Alecia Gillespie	LONG7096	Office	10	6
11HR	Alecia Gillespie	LONG7096	Office	11	1