



Chancery SMS

Program Management Basics

Table of Contents

Overview of Program Management	3
Log onto the System	3
Adding School Setup Information	4
Step 1: Searching for Programs to edit School Setup Information	4
Step 2: Set Up School Program Contact(s).....	5
Adding Students to a Program.....	7
Step 1: Apply a Student to a Program	7
Step 2: Assign Applicants to a Program	9
To View Applicants	11
To View Participants	11

Overview of Program Management

Program Management allows you to define specialized activities or courses that can enhance or replace a regular academic program. After creating a program, you can:

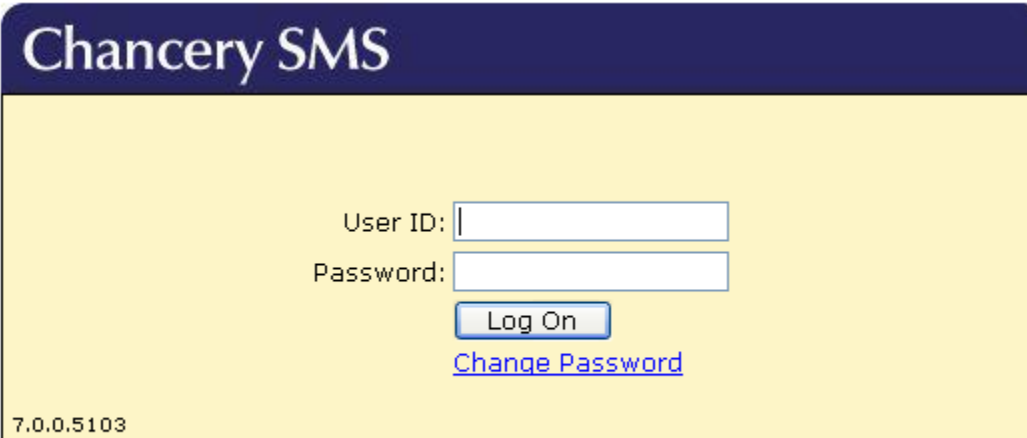
- Enter program information, sessions and locations.
- Assign programs to schools and assign staff to the program.
- Set up eligibility rules and track program participation.

District administrators can set up and define district level programs. They can also edit, delete, or copy programs and assign programs to schools.

School administrators can set up school-specific information for programs or edit programs assigned to their school by a district administrator.

Log onto the System

1. *Type* **User ID**
2. *Type* **Password**
3. *Click* on the **Log On** button.



Chancery SMS

User ID:

Password:

[Change Password](#)

7.0.0.5103

PEARSON Copyright© 1998-2009 Pearson Education, Inc., or its affiliate(s). All rights reserved.
www.pearsonschoolsandcolleges.com

Adding School Setup Information

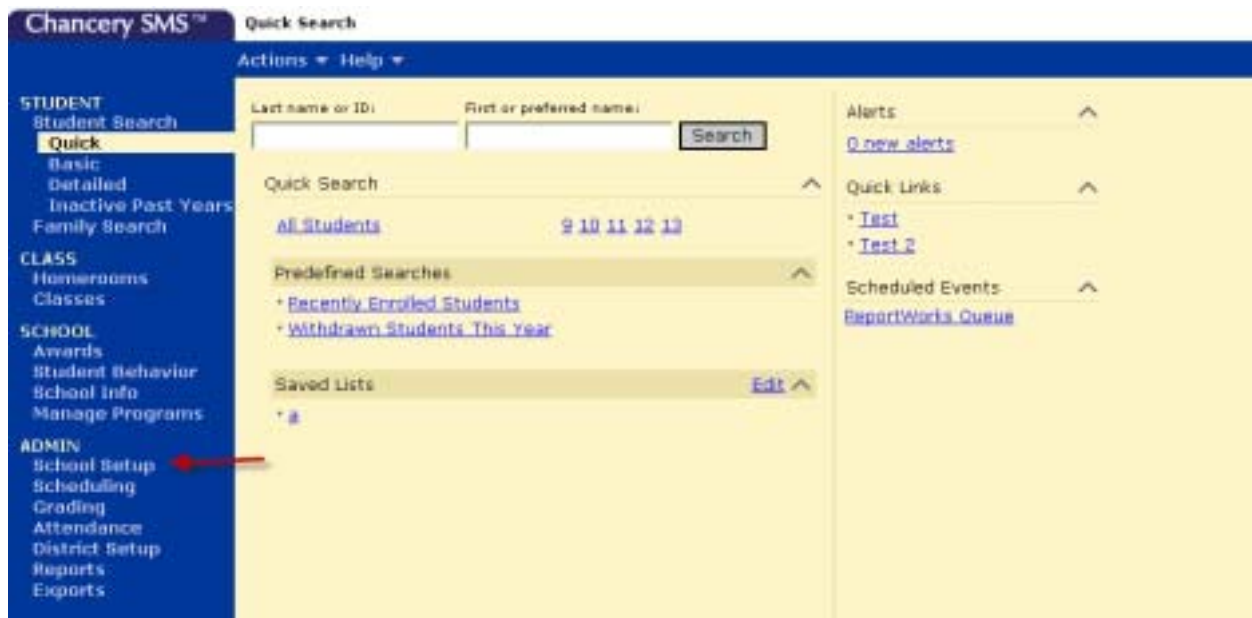
After district administrators have completed the district program setup, school administrators can begin to work on these programs. As a school administrator, you may enter school-specific information about the programs assigned to your school.

For each program assigned to the school, complete these steps to set school-specific information for the program:

- **Step 1: Search for Program to edit School Setup Information**
- **Step 2: Set Up School Program Contact(s).**
- **Step 3: Assign Staff to the Program.**

Step 1: Searching for Programs to edit School Setup Information

1. In the control bar, under ADMIN, click School Setup.



2. On the School Setup page, under Program Management, click Program Setup.
3. Enter your search parameters, click Search.

Program Search

Basic Detail

Search by:

Program category equals

Program equals

Program group equals

Program start date equals

Program end date equals

[Display All Records](#)

Search Results

List: - Select a search criteria -

Selected: 0 Total: 3

<input type="checkbox"/> Program category	Program	Code	Start date	End date
<input type="checkbox"/> After School Athletics	Varsity Football	VFootball	07/01/2007	06/21/2075
<input type="checkbox"/> Special Services	Mainstream	MNSTRM	01/30/2009	01/30/2099
<input type="checkbox"/> Academic Enhancement	INCLUSION (CO-TEACH) 20	INCCOT	04/29/2009	04/29/2012

Step 2: Set Up School Program Contact(s)

1. Click the Program Name link.

Program Search

Basic Detail

Search by:

Program category equals After School Athletics

Program equals

Program group equals

Program start date equals

Program end date equals

[Display All Records](#)

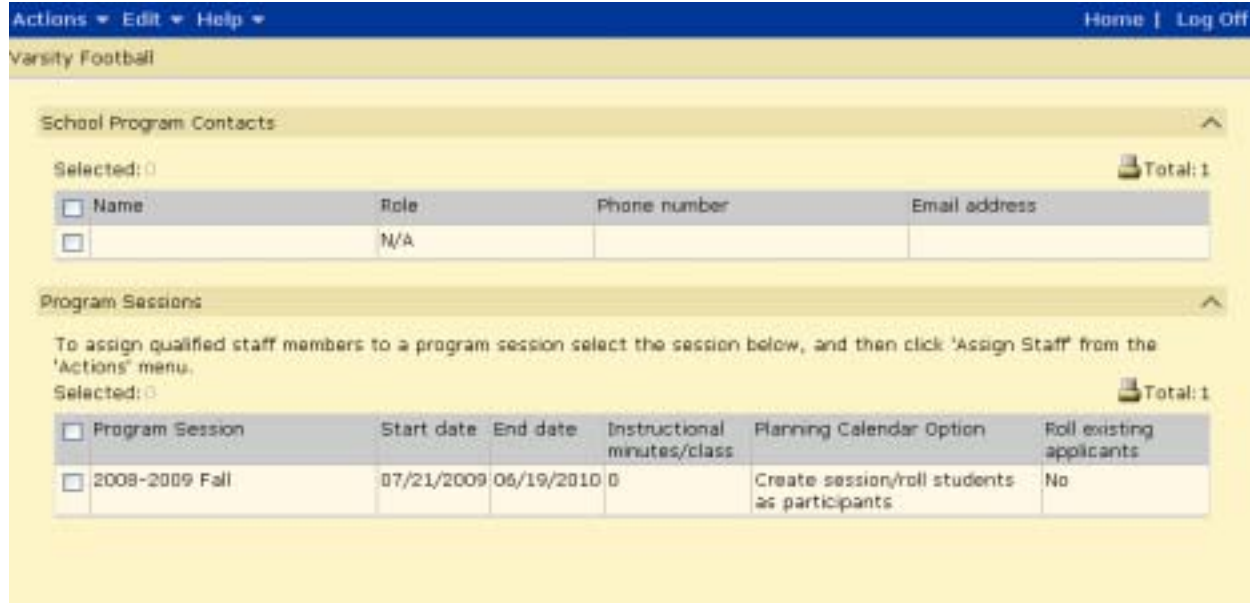
Search Results

List: Program category equals "After School Athletics"

Selected: 0 Total: 1

<input type="checkbox"/> Program category	Program	Code	Start date	End date
<input type="checkbox"/> After School Athletics	Varsity Football	VFootball	07/01/2007	06/21/2075

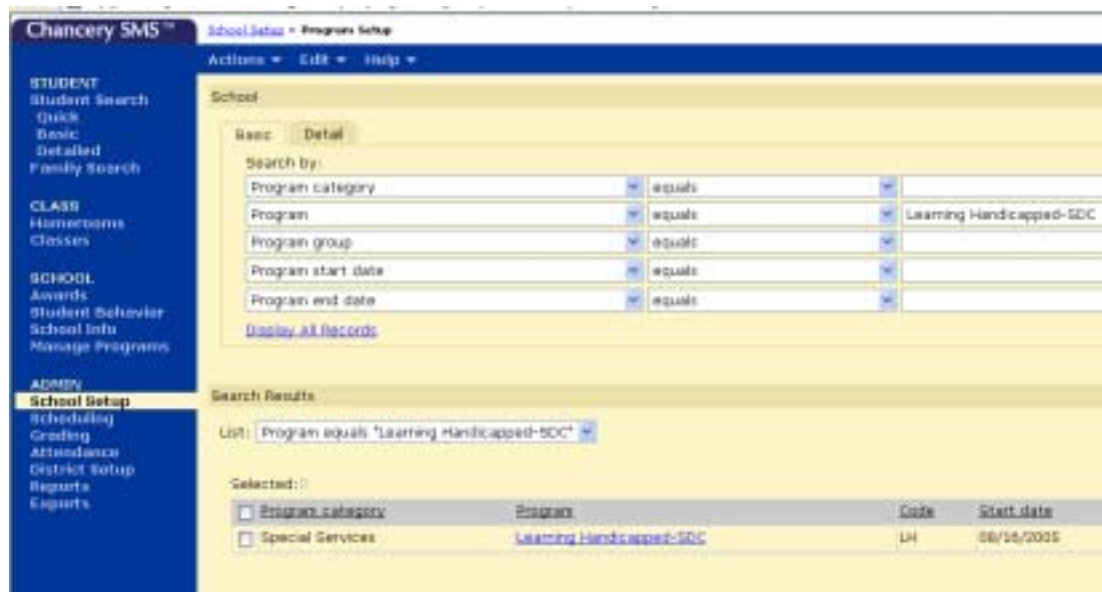
2. On the Setup School Info page, go to Actions, Add School Contact.



3. Under School Program Contacts, enter the Name and Role. Phone number and Email address is automatically populated from Staff Member's personal records.
4. Under Program Sessions, select a session and enter the Start date, End date, and Instructional minutes/class, if applicable.
5. Click Apply or OK to save.

Step 3: Assign Staff to the Program

1. Search for a program, click the Program Name link.



2. Select a program session, go to Actions > Assign Staff.
NOTE: Staff Assignment only stores contact information and is not related to access to the program.
3. Search for staff and then select the staff member from the search results.
4. Click Add. (To remove staff from a program, select staff and click Remove).

The screenshot shows a web application interface for staff assignment. At the top, there are navigation links for 'Actions' and 'Help', and 'Home' and 'Log Off'. Below that, the current session is identified as '2009-2009 Fall'. The main section is titled 'Assign Staff to the Program'. It contains instructions: 'To assign qualified staff members for this program perform a search, select the appropriate staff member(s) from the search results grid, and then click the 'Add' button.' Below the instructions, there is a 'Selected:' label and a 'Total: 0' indicator. A table is shown with the following columns: 'Name', 'Assigned schools', 'Staff ID', 'Credential expiry date', and 'Assignment status'. Below the table, it states 'There are no records in this list.' and provides 'Add' and 'Remove' buttons. Below this is the 'Staff Search' section, which has 'Basic' and 'Detail' tabs. Under the 'Basic' tab, there is a 'Search by:' section with five rows of search criteria: 'School Staff', 'Credential Area', 'Credential Type', 'Last Name', and 'District Qualified Staff'. Each row has a dropdown menu set to 'equals' and a text input field. A 'Search' button is located at the bottom right of the search section. Below the search section is a 'Search Results' section, which is currently empty.

Adding Students to a Program

Before a student is placed in a program, they must first be enrolled in the school where the program is being offered. Complete the following steps to add students to a program:

- **Step 1: Apply a Student to a Program.**
- **Step 2: Assign Applicants to a Program.**

Step 1: Apply a Student to a Program

A student is considered an applicant until they are assigned to the program or enrolled in the school.

Apply to a Program

1. Open a student record.
NOTE: To apply several students to the same program, it is best to select students by grade level. Select appropriate grade level from the Home page. Select students by checking the checkbox next to student. Once all students are selected, go to Actions > Apply to Program. Skip steps 2 and 3 below.
2. In the control bar, click Program Profile.
3. On the Program Profile page, go to Actions > Apply to Program.

Search Results

List: 8

Selected: 1 Total: 2

<input type="checkbox"/>	Student Name	ID	Gr(A)	HB	Gender	Birthdate	Contact
<input checked="" type="checkbox"/>	[REDACTED]	[REDACTED]	12	N/A	M	Jul 1, 1992	[REDACTED]
<input type="checkbox"/>	[REDACTED]	[REDACTED]	12	N/A	M	Dec 8, 1991	

Apply To Program

Selected Students: 7

Application

*Program category: After School Athletics

*Program: Varsity Baseball(2/17/2007 - 6/20/2050)

*Program session: 2008-2009 Spring(6/22/2009 - 6/21/2010)

*Location: Castle Park High School

Miles from school:

*Queue: General

Preference:

Rank weight:

Forms Received

Selected: 0 Total: 1

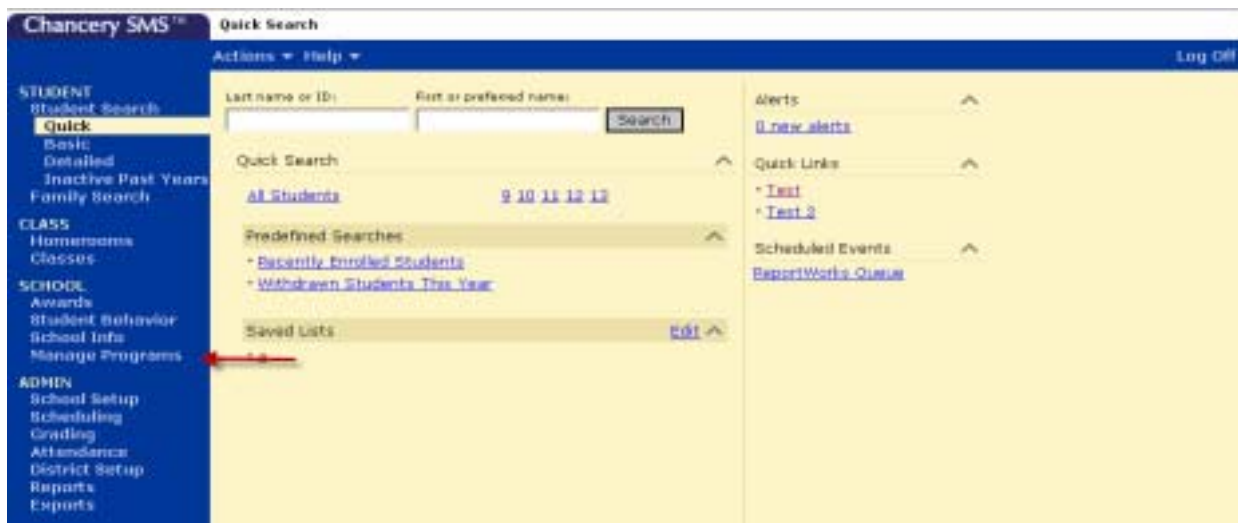
<input type="checkbox"/>	Form Name	Received Date	Received By	Verified Date	Verified By
<input type="checkbox"/>	Clearance Papers				

4. On the Apply to Program page, enter the following:
 - Program Category – Program categories are the first level of program organization. All program groups and programs are contained within a program category. Students are not assigned directly in program categories; rather, they are assigned to programs contained within program categories. Select the type of program the student is applying for.
 - Program – Programs are specialized activities or groups of courses that need to be controlled and/or tracked by a school or district. Select the program.
 - Program session – Refers to when program instruction is available, and for which grade levels. The District defines program sessions and assign them to locations. One program may have multiple sessions in several locations. Select the program session.
 - Location – Refers to the physical location of the program sessions. The District defines program locations, which may be schools or off-campus facilities. A single program may be available in several locations. Select a location.
 - Queue – Used to track program applications. Each program has a default General queue, automatically created by the system. The General queue is used for general or open enrollment, and has no capacity limits or constraints. Select the “General” queue.
5. Under Forms Received, indicate any form received from the student for the program application, if applicable.
6. Click Continue. General Program Information will now appear.

Step 2: Assign Applicants to a Program

After you determine what applicants are eligible for the selected program, assign those applicants to the program. A student who is currently assigned to a program is called a participant. Students can be participants in multiple programs.

1. In the control bar, under SCHOOL, click Manage Programs.



1. Enter your search parameters, click Search.
2. Select program. Go to Actions > Manage Queues & Applicants.
3. Click on the number link under the # Applications column.

Program Information

Program category: After School Athletics
 Program: Varsity Baseball
 Program session: 2008-2009 Spring

Queues

Selected: 0 Total: 1

Queue Name	Capacity	% Over Allowed	# Spaces Taken	# Spaces Available	# Applications	Queue Close Date	Queue Elig. Rules
<input type="checkbox"/> General	0	0%	7	Unlimited	1		No

To add a queue, from the Actions menu, click Add Queue...

	Base capacity only:	Including % over allowed:
Total capacity at this location:	(Unlimited)	(Unlimited)
Total # spaces taken at this location:	7	7
Total # spaces available at this location:	(Unlimited)	(Unlimited)
Total # applications for this location:	7	7
Overall % full for this location:	0.0 %	0.0 %

4. Select students to assign to program. Go to Actions > Assign to Program.
5. In the Assign to Program dialog window, enter an effective date.
6. Click OK.

Assign To Program -- Web Page Dialog

Enter the effective date for the student assignment to this program.

*Effective Date:

Today
 Tomorrow
 Specify: mm/dd/yyyy

http://sistraining.sweetwaterschools.org/ChancerySMS/ProgramManagement/ Internet

To View Applicants

1. In the control bar, under SCHOOL, click Manage Programs.
2. Enter your search parameters, click Search.
3. Select program. Go to Actions > Manage Queues & Applicants.
4. Click on the number link under the # Applications column.

Program Search

Basic Detail

Search by:

Program Category	equals	
Program	equals	
Program Group	equals	
Program Start Date	equals	mm/dd/yyyy
Program End Date	equals	mm/dd/yyyy

[Display All Records](#)

Search Results

List: [- Select a search criteria -](#)

Selected: 0 Total: 2

<input type="checkbox"/>	Session	Start Date	End Date	Student Capacity	# of Participants	# of Applicants
Inclusion (CO-TEACH) 20						
<input type="checkbox"/>	2009-2010	06/14/2009	06/05/2010	0		
Varsity Football						
<input type="checkbox"/>	2009-2009 Fall	07/21/2009	06/19/2010	0	2	

To View Participants

1. In the control bar, under SCHOOL, click Manage Programs.
2. Enter your search parameters, click Search.
3. Select program. Go to Actions > Manage Participants.

Actions Edit Help Home Log Off

Acosta Vista High School

Program Information

Program category: After School Athletics
 Program: Varsity Football
 Program session: 2009-2009 Fall
 Planning calendar option: Create session/roll students as participants
 Roll existing applicants
 Planning calendar Requested School controlled by Program Management

Eligibility Calculations

Selected: 0 Total: 0

<input type="checkbox"/>	Rule Name	Rule Description	Rule Start Date	Rule End Date
There are no records in this list.				

To re-calculate eligibility, select one rule above and one or more students below, then select 'Calculate Eligibility' from the Actions menu.

Participating Students

Selected: 0 Total: 2

<input type="checkbox"/>	Student name	Entry date	Student number	Eligibility last run	Eligibility rule name	Eligibility status
<input type="checkbox"/>	ADATO, DAVID MOISES	09/03/2009	844762			Not calculated
<input type="checkbox"/>	AGAS II, REGINO JOS PONCE	09/03/2009	351498			Not calculated

- Indicates Student Override an initial entry into program session.