



# Back-to-School Guide – Middle/High Schools

Date: August 19, 2019

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## Back-to-School Checklist – Middle/High Schools

✓	Task	Navigation	Comments
	Commit the active schedule	<b>Build</b> view > <b>Scenario</b> top tab > click into the detail of the scenario that represents the new school year.	<ul style="list-style-type: none"> <li>• This creates the master schedule in the school view.</li> <li>• Term dates must be set on each schedule term before the schedule can be committed.</li> <li>• Apply rotations <i>before</i> committing the schedule, if rotations were created.</li> </ul>
	Create Grade terms	<b>School</b> view > <b>Grades</b> top tab > <b>Grade Terms</b> side tab.	<ul style="list-style-type: none"> <li>• Add in each grade term required by the school.</li> </ul>
	Confirm master schedule structure	<b>School</b> view > <b>Schedule</b> top tab > <b>Structure</b> side tab.	<ul style="list-style-type: none"> <li>• <b>Terms &gt; Details:</b> <ul style="list-style-type: none"> <li>○ <b>Base terms per year:</b> appropriate to course length.</li> <li>○ <b>Start and End dates:</b> appropriate to course length and term.</li> <li>○ <b>Grade term cover map:</b> appropriate boxes should be checked to indicate when this course length is reported on for the specified term.</li> </ul> </li> <li>• <b>Days:</b> correct number of days should be represented.</li> <li>• <b>Periods:</b> correct number of periods should be represented. <i>Periods that have non-attendance courses scheduled into them should have the “include in scheduling” flag unchecked.</i></li> <li>• <b>Bell Schedules:</b> review bell schedules to ensure rotation of periods is correct.</li> </ul>
	Confirm master schedule sections	<b>Schedule</b> top tab > <b>Master</b> side tab	<ul style="list-style-type: none"> <li>• Sort by <b>Schedule</b> header: there should not be any blank schedule expressions.</li> <li>• Sort by <b>Schedule Term &gt; Code</b> header: there should not be blank schedule terms.</li> <li>• Sort by <b>Teacher</b> header: adjust teacher assignments on sections as necessary to reflect new staff.</li> <li>• Sort by <b>Total:</b> review class enrollment to see that students are actually in the sections. If there are zeros, is that appropriate?</li> </ul>
	Review and adjust School Calendar	<b>School</b> top tab > <b>Calendars</b> side tab > select the current year calendar > click <b>Dates</b>	<ul style="list-style-type: none"> <li>• Set filter to <b>Days in session</b>. Review and set any additional non-school days that are specific to your school.</li> </ul>

✓	Task	Navigation	Comments
			<ul style="list-style-type: none"> <li>• Ensure all days in session have a day number assigned.</li> <li>• Ensure appropriate bell schedules are assigned to school dates.</li> </ul>
	Review school setup screen	<b>School</b> top tab > <b>Setup</b> side tab > click the <b>Details</b> leaf	<ul style="list-style-type: none"> <li>• Adjust principle/vice principal information, as necessary</li> <li>• Ensure the Class to Daily Attendance Procedure? box is checked.</li> </ul>
	Review active staff	<b>School</b> view > <b>Staff</b> top tab	<ul style="list-style-type: none"> <li>• <i>Do not add or delete staff in this list!</i> Identify staff changes and contact district support staff to make necessary adjustments.</li> </ul>
	Student Data Review	<b>School</b> view > <b>Student</b> top tab	<ul style="list-style-type: none"> <li>• Admit any new registrations and withdraw students as appropriate. <i>Remember withdraw checklist items!</i></li> <li>• <b>Current Members</b> filter: shows all active students with a current admission date.</li> <li>• <b>Primary Active Students</b> filter: shows all active students with current or future admission dates.</li> <li>• <b>All Secondary Students</b> filter: ensure the correct students appear.</li> <li>• Assign Homerooms (if applicable)</li> <li>• Mass update <b>Calendar</b> field to <b>Standard</b> for all Primary Active students.</li> <li>• Check for students with no courses using the <b>No Courses Scheduled</b> filter.</li> </ul>

## Purpose

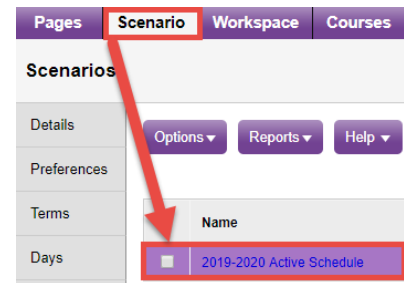
This document is intended to provide additional details for completing the tasks on the Back-To School Checklist – Middle/High Schools. These tasks represent the key activities that a school must complete to be prepared for registering students and taking attendance in the new school year.

### 1.0 Commit the Active Schedule

In the Build View, schools will “commit the active schedule” to move it to the School view for use in the current year. *This should only be done once*, so be sure it hasn’t been done already before committing the schedule from the build view!

#### 1.1 Confirm Scenario Details

1. In the **Build** view, click the **Scenario** top tab.
2. Click on the blue hyperlink of the scenario that will be used for the new school year. This will open the **Details** side tab.
3. In the new **Details** screen, confirm that the correct schedule has been selected.
  - a. **Start date:** set this date to the first day of school.
  - b. **End date:** set this date to the last day of school.
  - c. **Schedule terms:** ensure the correct schedule terms are represented. (1/4 = 9-week courses, 1/2 = semester courses, 1/1 = full year courses, etc.)
  - d. **Days per cycle:** ensure the schedule shows the correct number of days in the school schedule.
  - e. **Periods per day:** ensure the schedule shows the correct number of periods in the school schedule.
  - f. Click **Save**.



Save
 Cancel

Name *	<input type="text" value="2018-2019 Active Schedule"/>
Start date *	<input type="text" value="03/09/2019"/> <span style="color: red; font-weight: bold; border-radius: 50%; padding: 2px 5px;">a</span>
End date *	<input type="text" value="26/06/2020"/> <span style="color: red; font-weight: bold; border-radius: 50%; padding: 2px 5px;">b</span>
Schedule terms	1/6, 1/4, 1/2, 1/1 <span style="color: red; font-weight: bold; border-radius: 50%; padding: 2px 5px;">c</span>
Days per cycle	2 <span style="color: red; font-weight: bold; border-radius: 50%; padding: 2px 5px;">d</span>
Periods per day	8 <span style="color: red; font-weight: bold; border-radius: 50%; padding: 2px 5px;">e</span>
Commit date	

## 1.2 Confirm Term End Dates

1. Click the **Terms** side tab.
2. **For each schedule term, click into the detail and complete the following tasks:**
  - a. **Base terms per year:** must represent the number of times a course with this schedule term can occur in the year. For example
    - i. **Full year:** 1
    - ii. **Semester:** 2
    - iii. **Q1-4:** 4
  - b. **Term map:** ensure the correct box is checked for the term that this schedule term record will occur in. For example:
    - i. **Full year:** only one box and it is checked.
    - ii. **Semester 1:** two boxes with the first box checked.
    - iii. **Semester 2:** two boxes with the second box checked.
    - iv. **Q1-4:** four boxes – Q1 with the first box checked, Q2 with the second box checked, Q3 with the third box checked, Q4 with the fourth box checked.
3. Click on the **Set date** button to see the *Term Date Ranges* fields and the *Grade term cover map* check boxes.
  - a. **Start date:** set to the beginning of this term.
  - b. **End date:** set to the end of this term.
  - c. **Grade term cover map:** Grade term cover maps are not relevant here. They must be set in the **School** view.
4. Click **Save**.

The screenshot displays the 'Terms' details form. The sidebar on the left has 'Terms' selected with a red circle and the number 1. The main form contains the following elements:

- Code:** A dropdown menu showing 'Q1' with a red circle and the number 2.
- Name:** A text input field containing 'Term 1'.
- Base terms per year:** A text input field containing '4', a 'Set' button, and a red circle with the letter 'a'.
- Term map:** A row of four checkboxes, with the first one checked and a red circle with the letter 'b'.
- Term Date Ranges:** A 'Set date' button with a calendar icon and a red circle with the number 3.
- Term Date Ranges:** A table with columns 'Start' and 'End'. The 'Start' column has a date input '03/09/2019' with a calendar icon and a red circle with the letter 'a'. The 'End' column has a date input '05/11/2019' with a calendar icon and a red circle with the letter 'b'.
- Grade term cover map:** A row of four checkboxes, with the first one checked and a red circle with the letter 'c'.
- Buttons:** At the bottom, there are 'Save' and 'Cancel' buttons, with a red circle and the number 4 over the 'Save' button.

### 1.3 Confirm the Workspace

1. Click the **Workspace** top tab.
2. Click the **Sections** side tab.
  - a. Sections of classes should be displayed on this screen. Check the total number of sections.
  - b. The **Total** column should display students enrolled in sections.

Course	SecNo	ScheduleTerm > Code	Unrotated Schedule	Team	Schedule	Primary Staff > Name	PrimaryRoom >
MAC--11-DL-001	001	S2			5(1-2)		
MADER09--EL1-01	01	Q3			3(1-2)		115
MADER09--RB1-01	01	Q4			3(1-2)		115
MADFS08--01	01	X1			1(1-2)		175

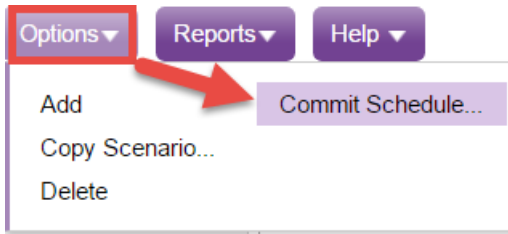
### 1.4 Apply Rotations (if applicable)

If a rotation has been created for the scenario that is being committed, it must be applied before the schedule is committed.

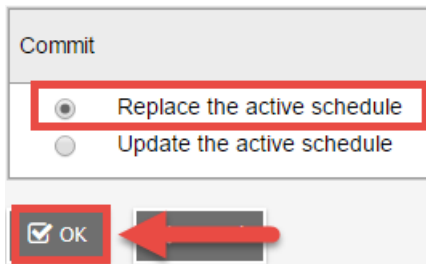
1. In the **Build** view, click the **Scenario** top tab.
2. Click on the blue hyperlink of the scenario that will be used for the new school year. This will open the **Details** side tab.
3. Click the **Rotations** side tab. Verify that the rotation is correct.
4. Click the **Workspace** top tab.
5. In the **Options** menu, click **Rotation**, then **Rotate Schedule**.
6. Read the pop-up message and click **OK** to continue.

## 1.5 Commit the Schedule

1. In the **Options** menu, select **Commit Schedule . . . .**



2. In the pop-up box, the **Replace the active schedule** radio button should be selected. Either option is fine as no active schedule currently exists in the school view.




3. Click **OK**. This will create the master schedule in the school view.

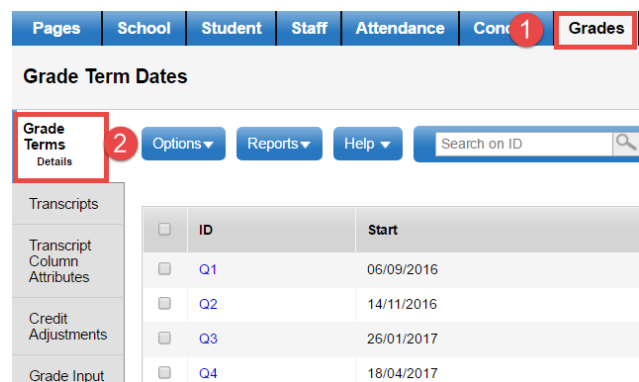
**Note:** This is a one-time activity to create the schedule in the school view. Once the schedule is committed, all changes will take place in the school view.

## 2.0 Create Grade Terms

Grade terms are the term dates at which schools will issue report cards (reporting periods).

1. In the **School** view, click the **Grades** top tab.
2. Click the **Grade Terms** side tab.
3. In the **Options** menu, select **Add**.

- a. **Term ID:** use the  to select the appropriate value for the first term.
  - i. a school that reports 4 times per year will select Q1
  - ii. a school that reports 3 times per year will select Tri 1
- b. **Start date:** enter the date that this reporting period starts.
- c. **End date:** enter the date that this reporting period ends.
- d. Click **Save**.



4. Repeat step 3, using the subsequent grade terms, until all grade terms are created.



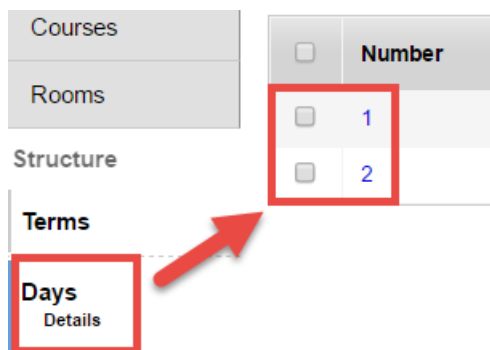
### 3.0 Confirm the Master Schedule Structure

Once the active schedule has been committed from the **Build** view, it will appear in the **School** view. It is important to confirm that the correct schedule structure is in place before the school year begins.

1. In the **School** view, select the **Schedule** top tab.
2. Click the **Structure** side tab.
  - a. **Terms** sub-side tab: Ensure the correct course lengths are represented here. Click into the details of each and confirm the correct selections for **Term map**, **Term date ranges** and **Grade term cover maps** are selected.

**Note: Grade term cover maps are critical for report cards! If uncertain about correct setup, refer to the Preparing for Report Cards – High Schools K-12 document for instruction.**

- b. Click the **Days** sub-side tab and confirm there are the correct number of days for this school schedule.

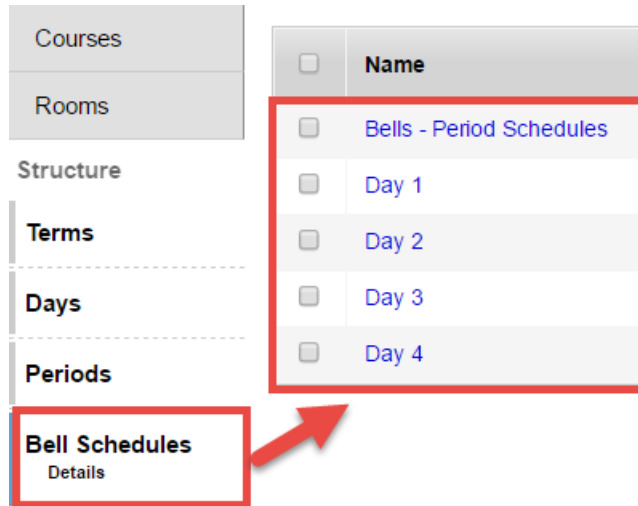


- c. Click the **Periods** sub-side tab:
      - i. Ensure the correct number of periods are represented.
      - ii. Ensure the **Is scheduled?** box is unchecked (N) for periods that are non-attendance periods.





Number	ID	Name	Scheduled
1	1	A	Y
2	2	B	Y
3	3	C	Y
4	4	D	Y
5	5	E OTT-am	Y
6	6	F OTT-pm	Y
7	7	G-OTT-am	Y
8	8	H-OTT-pm	Y

- d. Click the **Bell Schedules** side tab. Ensure the bell schedules accurately reflect the period rotations for the school. Non-attendance periods can be left out of the bell schedule.

**Note:** Typically, schools that have a rotated schedule only have one bell schedule.



## 4.0 Confirm the Master Schedule Sections


1. In the **School** view, click the **Schedule** top tab.
3. In the main list of sections, use the  icon, to select the field set called **Primary teacher**.
  - a. Click the **Schedule** column. Any blanks should sort to the top. Confirm that all sections have a schedule expression (day, period) assigned.
  - b. Click the **Schedule Term > Code** header. Any blanks should sort to the top. Confirm that all sections of all courses have a schedule term value that accurately represents their course length and term.
  - c. Click the **Primary Staff > Name** header. This will sort the sections by teacher name, with any blanks to the top. If sections require a new or different teacher:
    - i. In the **Options** menu, select **Modify List**.
    - ii. Click the  icon at the top of the **Primary Staff > Name** field. Use the  icon to select the teacher name that should be attached to the sections.
    - iii. Click the  icon at the top of the column to save changes *before proceeding to another page or column*.
  - d. Ensure that the **Max** column has the appropriate value for the number of students that can be enrolled in each section.

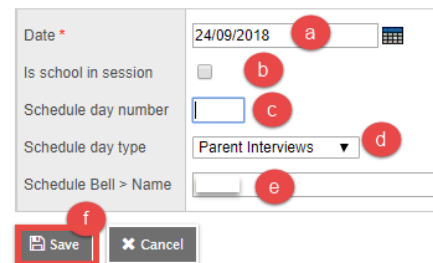
## 5.0 School Calendar

District support personnel will initialize the calendar at the district level, which will create a calendar for each school. Schools should review the dates in this calendar and make any adjustments necessary to indicate non-school days that are specific to the school. As well, middle and high schools need to indicate their day rotation and bell schedules.

### 5.1 Set Unique Non-Session Dates

This only needs to be done if the school has unique non-school dates that do not align with the district calendar.

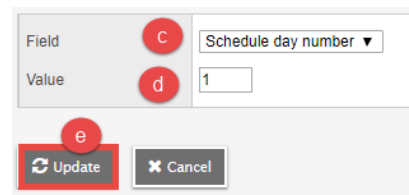
1. In the **School** view, click the **School** top tab.
2. Click the **Calendars** side tab. The calendar for the current school year will appear.
3. Click the **Dates** leaf. All dates in the current school year will appear.
4. Click the **Day Type** column header *twice* and review the non-session dates.
5. Use the  icon to filter for **Days in Session**. If the school has additional dates to be set to non-school dates, (a parent interview date unique to the school), this can be done now:
  - a. Click the blue hyperlink for that date.
  - b. **Is school in session** un-check the box.
  - c. **Schedule day number**: remove the value
  - d. **Schedule day type**: Use the drop-down menu on select why it is a non-school day.
  - e. **Schedule Bell > Name**: use the red X to remove the bell schedule.
  - f. Click **Save**. Click the **Dates** leaf to return to the list of all **Days in Session**.



### 5.2 Assign Schedule Days

**Day 1 Only Schools:** all **Days in session** should have a value of 1. If they do not, use the following process to assign day numbers.

- a. Set the filter to **Days in Session**.
- b. In the **Options** menu, select **Mass Update**. In the pop-up window:
- c. **Field**: use the drop-down menu to select Schedule day number.
- d. **Value**: enter 1.
- e. Click **Update**.
- f. Read the pop-up message and click **OK** to confirm and execute the update.



When the update is complete, the **DayNum** column will display a 1 for all days in session.

**Schools with 2 or more days in the school schedule:** the district calendar initialization should have assigned Day 1 to the first day of school, and then alternated the days for all in-session dates from there forward.

If the school added other non-session dates and needs the day number rotation to be changed, the following instructions can be used.

- In the **Options** menu, select **Reassign Schedule Days**.
- Start Date:** enter the date on which the re-assignment should start.
- End Date:** enter the date on which the re-assignment should end.
- Initial Schedule Day:** use the drop-down to select whether the start date should be a Day 1 or Day 2, or other day in the schedule structure.
- Click **OK**.

## 6.0 School Details


A change in principal, vice-principal(s), or school information may need to be made at the start of the school year.

- In the **School** top tab, click the **Setup** side tab.
- Click the blue hyperlink of the school **ID** to view the details. Make required adjustments to the Principal/Vice Principal information as necessary.
- Ensure the **Class to Daily Attendance Procedure?** box is checked.

## 7.0 Staff


Do not add or delete staff from the school staff list. If staff adjustments are necessary, contact the district support personnel to make the adjustments.

### 7.1 Review staff lists

1. In the **School** view, select the **Staff** top tab.
2. Use the  icon to set the filter to **All Staff**. **Do not delete staff from this list if they are not associated to your school. Advise district support staff that they should be removed.**
3. Click the **Status** header to sort active staff to the top. If expected staff do not appear as active, check to see if the staff member is in the list with a status of Inactive. To make a staff member active:
  - a. Click the blue hyperlink of the inactive staff member.
  - b. Use the drop-down menu on the **Status** field to select **Active**.
  - c. Click **Save**. Click the **Staff List** breadcrumb to return to the full staff list.
4. Review the list and determine if staff additions or deletions are required. Contact district support personnel to make the additions or deletions.
5. Review the homerooms assigned to each teacher and modify as necessary. To assign or modify a homeroom value for a teacher:
  - a. In the **Staff** top tab, check the blue hyperlink for the teacher to open the **Details** for that teacher.
  - b. Populate the **Homeroom** field with the appropriate value.
  - c. Click **Save**.

### 7.2 Assigning staff to sections



New or departing staff may mean a change is required on course sections.

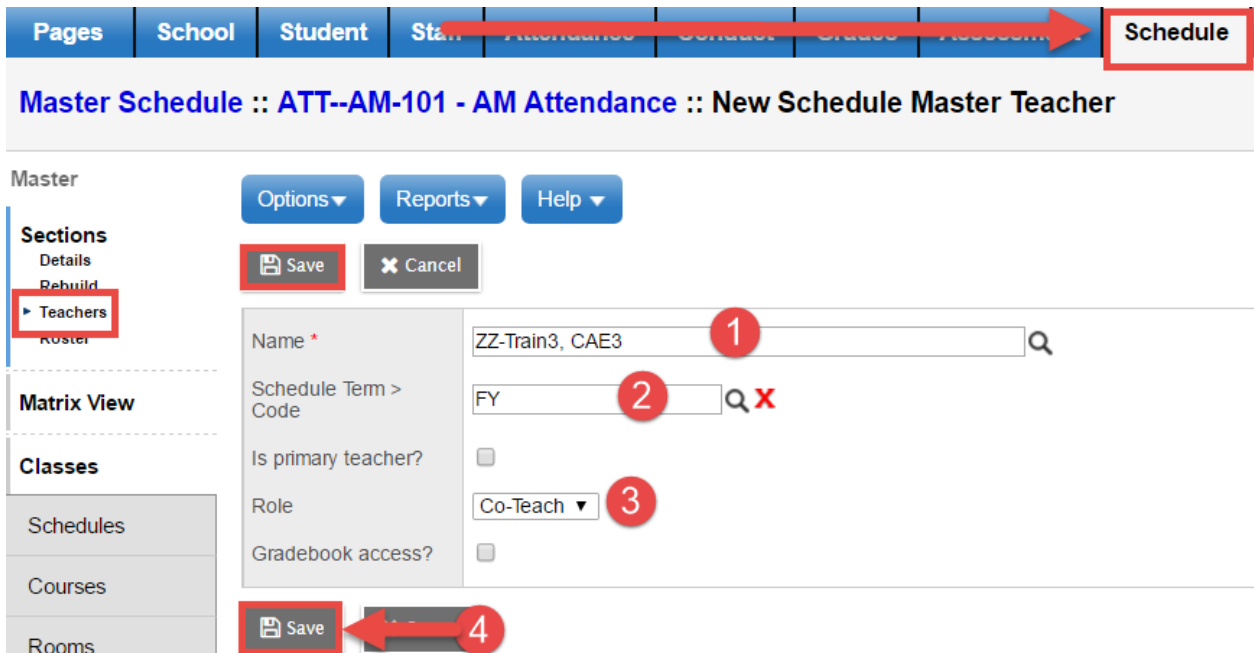
1. In the **School** view, click the **Schedule top tab**.
2. Click the **Master** side tab.
3. Click the blue hyperlink for the section that requires a staff person assigned.
4. In the **Primary Staff > Name** field, use the  to select the staff person from the pick list.
5. Click **Save**.

**Note:** **Options > Modify List** can also be used to update the **Primary Staff > Name** field while viewing all sections in the list.

### 7.3 Assigning additional teacher to sections

More than one teacher can be assigned to a class, if necessary.

1. In the **School** view, click the **Schedule top tab**.
2. Click the **Master** side tab.
3. Check the box beside the class that requires an additional teacher and click the **Teachers** leaf.
4. In the **Options** menu, click **Add**.
  - a. **Name:** Use the  icon to select the additional teacher from the pick list.
  - b. **Schedule Term > Code:** use the  to select **FY**.
  - c. **Is primary teacher?:** leave blank unless this is to be the main teacher for the classroom. Only one teacher can be assigned as the primary, so if the box is checked for this teacher, it must be unchecked for the other.
  - d. **Role:** This field is optional, but some schools like to set this value to **Co-Teach**.
  - e. **Gradebook access?:** This box is checked if this additional teacher requires access to the gradebook to enter marks.



Pages | School | Student | Status | Attendance | Schedule | Grades | Assessment | **Schedule**

Master Schedule :: ATT-AM-101 - AM Attendance :: New Schedule Master Teacher

Master


Options ▾ | Reports ▾ | Help ▾



Save | Cancel

Sections  
Details  
Rebuild  
▸ Teachers  
Roster

Matrix View

Classes  
Schedules  
Courses  
Rooms

Name \* ZZ-Train3, CAE3 

Schedule Term > Code FY  

Is primary teacher?

Role Co-Teach ▾

Gradebook access?

Save | Cancel

## 8.0 Student Data Review

### 8.1 Enrollments/Withdraws

School view > Student top tab

Review the student list. Enroll new students and review the list for students who were transitioned to the school or pre-admitted prior to the end of the previous year, but are not going to be attending and require withdraw.

#### Points to note about enrolling new students:

1. If the student is attending immediately, the enrollment date should be a current date and their status should be set as **Active**.
2. If the student is enrolling now, but not attending until a later date, the enrollment date should be set to the future date they are expected to arrive and the status of the student **will still be Active**. (The status of Pre-Reg is only for enrolling students for the next school year).
3. Ensure the new student has a calendar assigned to them for attendance purposes and is scheduled into the necessary course sections.

#### Points to note about withdrawing students that have not returned.

1. End-date student program assignments prior to withdraw.
2. Blank the homeroom value for the student prior to withdraw.
3. Remove locker information, and void fees.
4. Remove non-parent/guardian contacts if the student is leaving the district.

### 8.2 Check Student Status

All students who are currently attending the school should have a status of “Active”.

1. Set the filter to **Pre-Reg Students**. There should not be any students in this list. If there are, determine if they are attending the school:
  - a. **Attending:** change the student status to Active.
  - b. If the student is NOT attending, the status will still need to be changed to Active, at which time the student can then be withdrawn.

#### To change the student status:

1. Check the box beside the student name.
2. In the **Options** menu, select **Registration**, then **Change Student Status**.
3. In the pop-up window:
  - a. **Name:** use the select icon to choose the student.
  - b. **Date:** select the date of the change.
  - c. **Status:** use the drop-down menu to select **Active**.
  - d. Click **OK**.

**Update Enrollment Status**

Name  **a**

Current Primary School J Lloyd Crowe Secondary

Date  **b**

Reason

Status  **c**

Disable related user accounts

**d**

### 8.3 Check Secondary Students List

Secondary school associations for students should be reviewed to ensure only the correct students are cross-enrolled.

#### To check secondary school associations:


1. In the **Student** top tab, set the filter to **All Secondary Students**.
2. If the student should not be associated with this school in the current year, the secondary school association can be deleted.

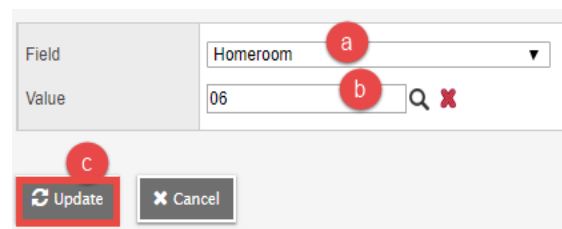
To delete a secondary school association:

- a. Check the box beside the student that requires the deletion.
- b. Click the **Membership** side tab.
- c. Click the **Schools** sub-side tab.
- d. Find this school in the list and check the box beside it. It should show a **Year** that represents the current year.
- e. In the **Options** menu, select **Delete**.
- f. Read the pop-up warning and confirm the deletion, if appropriate.
- g. Check the **Transcript** side tab for the student to ensure that all transcript records associated with this school are finalized (final mark, completion date, etc).

### 8.4 Assign homerooms to all students (if applicable)

If the school uses homerooms to issue report cards or for grouping students for other reasons, the following process can be used to update homeroom values.


1. In the **School** view, click the **Student** top tab.
2. Use the  icon to select the **Primary Active Students** filter.
3. Check the box beside all students that will have the same homeroom assignment.
4. In the **Options** menu, select **Show Selected**. THIS IS VERY IMPORTANT!
5. In the **Options** menu, select **Mass Update**.
  - a. **Field:** use the drop-down menu to select **Homeroom**.
  - b. **Value:** enter the homeroom value. This value must exactly match the homeroom value on the teacher's staff record.
  - c. Click **Update**. Read the pop-up warning to ensure the correct number of records are being updated. Proceed with the update.




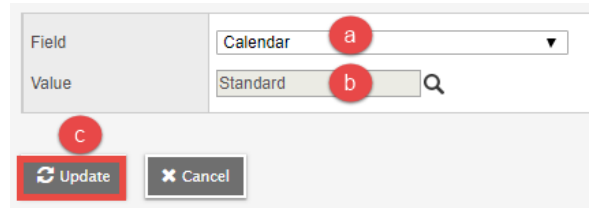
Field	Homeroom <span style="color: red;">a</span>
Value	06 <span style="color: red;">b</span> <input type="button" value="Q"/> <input type="button" value="X"/>
<input style="border: 2px solid red; color: red; font-weight: bold; margin-right: 10px;" type="button" value="Update"/> <input type="button" value="Cancel"/>	




## 8.5 Assign calendars to all students

1. In the **School** view, click the **Student** top tab.
2. Use the  icon to select the **Primary Active Students** filter.
3. Check the box beside all students that will have the same homeroom assignment.
4. In the **Options** menu, select **Mass Update**.

- a. **Field:** use the drop-down menu to select **Calendar**.
- b. **Value:** use the  to select the **Standard** calendar. Click **OK**.
- c. Click **Update**. Read the pop-up warning and confirm the update.






## 8.6 Identify Students with no Courses

1. In the **School** view, click the **Student** top tab.
2. Use the  icon to select the **No Courses Scheduled** filter.
3. Advise counsellor of students with no courses.

## 8.7 Review locker assignments

Locker values may still be assigned for students that withdrew through graduation or manual withdraw. These should be removed for re-assignment to new or continuing students, as appropriate.

1. In the **School** view, click the **Student** top tab.
2. Use the  icon to select the **Lockers** field set.
3. Query for students with an Enrollment Status of Withdrawn.
4. In the **Options** menu, click **Modify List**.
5. Click the  icon at the top of the **Locker** column. This will open the fields for editing. Delete the values.
6. *Be sure to click the  icon before moving to the next page or leaving the column!* Otherwise, changes will be lost.
7. Click the **Student** top tab to shut off Modify List.

