



## Scheduling Considerations for Schools Using PowerScheduler

### Build & Load process is suggested for schools with...

- Significant changes of the structure of the schedule (Terms, Days and/or Periods);
- Significant changes of courses offered;
- Students have requests for all courses;
- Significant changes of teacher assignments; and/or
- Significant changes of student population and/or requests.

#### Processes & Tasks

Phase I: PowerSchool System Administrator (available references — [Prepare to Build Checklist](#), [Prepare to Build Workbook](#), [Load Process Checklist](#) and [Load Process Workbook](#))

- Create New Courses at the District Office and associate courses to each school
- Manage School Course Availability for the future schedule year

Phase II: School PowerSchool Administrator and/or School Scheduling Staff

- Create the future year in PowerSchool Setup > School > Years & Terms > New
- Create the future schedule year scenario in PowerScheduler Auto Scheduler Setup (Years and Terms, Periods, Days)
- Manage Courses for the future schedule year PowerScheduler > Course Catalog > New or Edit existing catalog
- Manage Student scheduling information PowerSchool > Select Students > Functions > Next School Indicator; PowerScheduler > Auto Fill Student Information (Next Year Grade, Schedule This Student, Priority, Year of Graduation)
- Manage Staff Scheduling information PowerSchool > Start Page > Staff > Select a Staff Member > Schedule Setup (Schedule this Teacher, Maximum Consecutive Periods, House and/or Team)
- Create [Course Groups](#) for student requests
- Create [Student Requests Screens](#) for each grade
- Enter, review & manage student course requests
- Define required scheduling information for each course including PowerScheduler > Course > Preferences, PowerScheduler > Course > Course Relationships and PowerScheduler > Constraints > Build & Load Constraints
- Create teacher assignments for each course PowerScheduler > Course > Assignments and/or teacher PowerScheduler > Teacher > Assignments to be scheduled
  - PowerScheduler > Reports > Teacher Assignments by Teacher
  - PowerScheduler > Reports > Teacher Assignments by Course
- Complete entry of required scheduling information

Phase III: School scheduling staff

- Validate Build scheduling information PowerScheduler > Build – Validate Only
- Build Master Schedule
- Load student requests
- Evaluate/review/edit the Master Schedule and student schedules (recursive processes)
  - PowerScheduler > Reports > Schedule Course Enrollment
  - PowerScheduler > Reports > Master Schedule List and/or Master Schedule (PDF)
  - PowerScheduler > Reports > Student Schedule List
- Manage individual student schedules in PowerScheduler > Students > Schedule > Manually Schedule Student
- Consult with PowerSchool System Administrator about the timing and responsibilities for committing the future schedule in preparation for End of Year Process

### Build & Load using Copy the Master Schedule & Auto Generate Teacher Assignments is suggested for schools with...

- No changes of the structure of the schedule (Terms, Days and/or Periods);
- Current year master schedule is functional;
- Minor changes of courses offered;
- Minor changes of teacher assignments;
- Students have requests for all courses; and
- Minor changes of student population and/or requests.

#### Processes & Tasks

Phase I: PowerSchool System Administrator (available references — [Prepare to Build Checklist](#), [Prepare to Build Workbook](#), [Copy the Master Schedule](#), [Load Process Checklist](#) and [Load Process Workbook](#))

- Create New Courses at the District Office and associate courses to each school
- Manage School Course Availability for the future schedule year

Phase II: School PowerSchool Administrator and/or School Scheduling Staff

- Create the future year in PowerSchool Setup > School > Years & Terms > New
- Create the future schedule year scenario in PowerScheduler Auto Scheduler Setup (Years and Terms, Periods, Days)



- Manage Courses for the future schedule year PowerScheduler > Course Catalog > New or Edit existing catalog
- Manage Student scheduling information PowerSchool > Select Students > Functions > Next School Indicator; PowerScheduler > Auto Fill Student Information (Next Year Grade, Schedule This Student, Priority, Year of Graduation)
- Manage Staff Scheduling information PowerSchool > Start Page > Staff > Select a Staff Member > Schedule Setup (Schedule this Teacher, Maximum Consecutive Periods, House and/or Team)
- Create [Course Groups](#) for Student Requests
- Create [Student Requests Screens](#) for each grade
- Enter, review & manage student course requests
- Define required scheduling information for each course including Preferences, Course Relationships and Build & Load Constraints
- Create the Master Schedule using PowerScheduler > Functions > Copy the Master Schedule
- Create teacher assignment using PowerScheduler > Functions > Auto Generate Teacher Assignments
- Review and edit teacher assignments for each course PowerScheduler > Course > Assignments and/or teacher PowerScheduler > Teacher > Assignments to be scheduled
  - PowerScheduler > Reports > Teacher Assignments by Teacher
  - PowerScheduler > Reports > Teacher Assignments by Course
- Complete entry of required scheduling information

## Phase III: School scheduling staff

- Validate Build scheduling information PowerScheduler > Build – Validate Only
- Build Master Schedule
- Load student requests
- Evaluate/review/edit the Master Schedule and student schedules (recursive processes)
  - PowerScheduler > Reports > Schedule Course Enrollment
  - PowerScheduler > Reports > Master Schedule List and/or Master Schedule (PDF)
  - PowerScheduler > Reports > Student Schedule List
- Manage individual student schedules in PowerScheduler > Students > Schedule > Manually Schedule Student
- Consult with PowerSchool System Administrator about the timing and responsibilities for committing the future schedule in preparation for End of Year Process

## Load Only using Copy the Master Schedule is suggested for schools with...

- No changes of the structure of the schedule (Terms, Days and/or Periods);
- Current year master schedule is functional;
- Minor changes of courses offered;
- Minor changes of teacher assignments;
- Students have requests for all courses; and
- Minor changes of student population and/or requests.

## Processes & Tasks

Phase I: PowerSchool System Administrator (available references – [Copy the Master Schedule](#), [Load Process Checklist](#) and [Load Process Workbook](#))

- Create New Courses at the District Office and associate courses to each school
- Manage School Course Availability for the future schedule year

## Phase II: School PowerSchool Administrator and/or School Scheduling Staff

- Create the future year in PowerSchool Setup > School > Years & Terms > New
- Create the future schedule year scenario in PowerScheduler Auto Scheduler Setup (Years and Terms, Periods, Days)
- Manage Courses for the future schedule year PowerScheduler > Course Catalog > New or Edit existing catalog
- Manage Student scheduling information PowerSchool > Select Students > Functions > Next School Indicator; PowerScheduler > Auto Fill Student Information (Next Year Grade, Schedule This Student, Priority, Year of Graduation)
- Manage Staff Scheduling information PowerSchool > Start Page > Staff > Select a Staff Member > Schedule Setup (Schedule this Teacher)
- Create [Course Groups](#) for Student Requests
- Create [Student Requests Screens](#) for each grade
- Enter, review & manage student course requests
- Define required scheduling information for each course including Preferences, Course Relationships and Load Constraints
- Create the Master Schedule using PowerScheduler > Functions > Copy the Master Schedule
- Review and edit the Master Schedule for each course PowerScheduler > Course > Sections and/or teacher PowerScheduler > Teacher > Schedule to be scheduled and/or by using PowerScheduler > Visual Scheduler
- Complete entry of required scheduling information

## Phase III: School scheduling staff

- Validate Load scheduling information PowerScheduler > Load – Validate Only
- Load student requests
- Evaluate/review/edit the Master Schedule and student schedules (recursive processes)
  - PowerScheduler > Reports > Schedule Course Enrollment



- PowerScheduler > Reports > Master Schedule List and/or Master Schedule (PDF)
- PowerScheduler > Reports > Student Schedule List
- Manage individual student schedules in PowerScheduler > Students > Schedule > Manually Schedule Student
- Consult with PowerSchool System Administrator about the timing and responsibilities for committing the future schedule in preparation for End of Year Process

## Load Only creating a Master Schedule using Visual Scheduler and/or Teacher > Schedule, Course > Sections is suggested for schools with...

- Unique and/or atypical meeting patterns for some or all courses;
- Minor changes of courses offered;
- Minor changes of teacher assignments; and
- Students have requests for all courses.

### Processes & Tasks

Phase I: PowerSchool System Administrator (available references — [Load Process Checklist](#), [Load Process Workbook](#) and [Visual Scheduler Quick Reference Card](#))

- Create New Courses at the District Office and associate courses to each school
- Manage School Course Availability for the future schedule year

Phase II: School PowerSchool Administrator and/or School Scheduling Staff

- Create the future year in PowerSchool Setup > School > Years & Terms > New
- Create the future schedule year scenario in PowerScheduler Auto Scheduler Setup (Years and Terms, Periods, Days)
- Manage Courses for the future schedule year PowerScheduler > Course Catalog > New or Edit existing catalog
- Manage Student scheduling information PowerSchool > Select Students > Functions > Next School Indicator; PowerScheduler > Auto Fill Student Information (Next Year Grade, Schedule This Student, Priority, Year of Graduation)
- Manage Staff Scheduling information PowerSchool > Start Page > Staff > Select a Staff Member > Schedule Setup (Schedule this Teacher)
- Create [Course Groups](#) for Student Requests
- Create [Student Requests Screens](#) for each grade
- Enter, review & manage student course requests
- Define required scheduling information for each course including Preferences, Course Relationships and Load Constraints
- Create the Master Schedule using PowerScheduler > Functions > Copy the Master Schedule
- Review and edit the Master Schedule for each course PowerScheduler > Course > Sections and/or teacher PowerScheduler > Teacher > Schedule to be scheduled and/or by using PowerScheduler > Visual Scheduler
- Complete entry of required scheduling information

Phase III: School scheduling staff

- Validate Load scheduling information PowerScheduler > Load – Validate Only
- Load student requests
- Evaluate/review/edit the Master Schedule and student schedules (recursive processes)
  - PowerScheduler > Reports > Schedule Course Enrollment
  - PowerScheduler > Reports > Master Schedule List and/or Master Schedule (PDF)
  - PowerScheduler > Reports > Student Schedule List
- Manage individual student schedules in PowerScheduler > Students > Schedule > Manually Schedule Student
- Consult with PowerSchool System Administrator about the timing and responsibilities for committing the future schedule in preparation for End of Year Process

## Load Only creating a Master Schedule using Copy the Master Schedule, Visual Scheduler and/or Teacher > Schedule, Course > Sections for sections of electives/options courses while using dependent sections for core academic courses is suggested for schools with...

- Unique and/or atypical meeting patterns for some or all courses;
- Minor changes of courses and/or teacher assignments;
- Students have requests for electives/options but do not have requests for core academics; and
- Students are assigned to a homeroom section and students are enrolled as a cohort in core academic sections of courses from the homeroom section enrollment.

### Processes & Tasks

Phase I: PowerSchool System Administrator (available references — [Copy the Master Schedule](#), [Load Process Checklist](#), [Load Process Workbook](#) and [Visual Scheduler Quick Reference Card](#))

- Create New Courses at the District Office and associate courses to each school
- Manage School Course Availability for the future schedule year

Phase II: School PowerSchool Administrator and/or School Scheduling Staff

- Create the future year in PowerSchool Setup > School > Years & Terms > New
- Create the future schedule year scenario in PowerScheduler Auto Scheduler Setup (Years and Terms, Periods, Days)



- Manage Courses for the future schedule year PowerScheduler > Course Catalog > New or Edit existing catalog
- Manage Student scheduling information PowerSchool > Select Students > Functions > Next School Indicator; PowerScheduler > Auto Fill Student Information (Next Year Grade, Schedule This Student, Priority, Year of Graduation)
- Manage Staff Scheduling information PowerSchool > Start Page > Staff > Select a Staff Member > Schedule Setup (Schedule this Teacher)
- Create [Course Groups](#) for Student Requests
- Create [Student Requests Screens](#) for each grade
- Enter, review & manage student course requests
- Define required scheduling information for each course including Preferences, Course Relationships and Load Constraints
- Create the Master Schedule for each course PowerScheduler > Course > Sections or teacher PowerScheduler > Teacher > Schedule to be scheduled and/or by using PowerScheduler > Visual Scheduler
- Complete entry of required scheduling information

## Phase III: School scheduling staff

- Validate Load scheduling information PowerScheduler > Load – Validate Only
- Load student requests for elective/option courses
- Evaluate/review/edit the Master Schedule and student schedules (recursive processes)
  - PowerScheduler > Reports > Schedule Course Enrollment
  - PowerScheduler > Reports > Master Schedule List and/or Master Schedule (PDF)
  - PowerScheduler > Reports > Student Schedule List
- Enter PowerScheduler > Courses > Sections > Dependent Sections for each section of the homeroom course
- Schedule students into sections of homeroom using PowerScheduler > Students > Browse by grade > Select Students by Hand > Functions > Schedule Mass Enroll in the appropriate section of homeroom (filter by teacher, term, day, etc. or enter course.section)
- Manage individual student schedules in PowerScheduler > Students > Schedule > Manually Schedule Student
- Consult with PowerSchool System Administrator about the timing and responsibilities for committing the future schedule in preparation for End of Year Process

## Creating a Master Schedule using Copy the Master Schedule, Visual Scheduler and/or Teacher > Schedule, Course > Sections & using dependent sections for all course section enrollment is suggested for schools with...

- Unique and/or atypical meeting patterns for some or all courses;
- Students assigned to a homeroom section and are enrolled as a cohort in sections of courses from the homeroom section enrollment; and
- Students do not have requests for any courses.

## Processes & Tasks

### Phase I: PowerSchool System Administrator (available references — [Copy the Master Schedule](#) and [Visual Scheduler Quick Reference Card](#))

- Create New Courses at the District Office and associate courses to each school
- Manage School Course Availability for the future schedule year

### Phase II: School PowerSchool Administrator and/or School Scheduling Staff

- Create the future year in PowerSchool Setup > School > Years & Terms > New
- Create the future schedule year scenario in PowerScheduler Auto Scheduler Setup (Years and Terms, Periods, Days)
- Manage Courses for the future schedule year PowerScheduler > Course Catalog > New or Edit existing catalog
- Manage Student scheduling information PowerSchool > Select Students > Functions > Next School Indicator; PowerScheduler > Auto Fill Student Information (Next Year Grade, Schedule This Student, Priority, Year of Graduation)
- Manage Staff Scheduling information PowerSchool > Start Page > Staff > Select a Staff Member > Schedule Setup (Schedule this Teacher)
- Define required scheduling information for each course including Preferences, Course Relationships and Load Constraints
- Edit the Master Schedule for each course PowerScheduler > Course > Sections or teacher PowerScheduler > Teacher > Schedule to be scheduled and/or by using PowerScheduler > Visual Scheduler
- Complete entry of required scheduling information

### Phase III: School scheduling staff

- Evaluate/review/edit the Master Schedule
  - PowerScheduler > Reports > Master Schedule List and/or Master Schedule (PDF)
- Enter PowerScheduler > Courses > Sections > Dependent Sections for each section of the homeroom course
- Schedule students into sections of homeroom using PowerScheduler > Students > Browse by grade > Select Students by Hand > Functions > Schedule Mass Enroll in the appropriate section of homeroom (filter by teacher, term, day, etc. or enter course.section)
- Manage individual student schedules in PowerScheduler > Students > Search or Browse > Select Student > Schedule > Manually Schedule Student
- Consult with PowerSchool System Administrator about the timing and responsibilities for committing the future schedule in preparation for End of Year Process