This document details the Chancery SMS process to access, filter, schedule, save and print the *H_Cumulative Learning Profile – Grades PK – 8* report. When appropriate data exists, basic student demographics, special programs indicators, grades, assessments, and other information items are pre-printed.

PROCESS
To learn about the purpose of and how to complete the Cumulative Learning Profile (CLP) documents, visit the HISD Curriculum portal site at http://www.houstonisd.org//Domain/8050 .

ACCESS
Users must be able to access to Chancery SMS and login under one of the following school-user roles:

> Principal
> R/E/W w/ Attendance
> R/E/W w/Grade Reporting
> Register/Enroll/Withdraw
> SIS Data
> Special Pops
> Special Pops w/Sp. Ed.
> Teacher

If none of these roles are available to the user, if appropriate trainings are complete, a new security form may be submitted with the Principal's approval. Campus-based employees designated in PeopleSoft as "Teacher" are automatically granted access to Chancery. They must also have active students scheduled in their classroom. The Principal's signature is required on all security requests for staff assigned to their campus. Instructions for access and the security form are available on the SIS Help portal. http://sishelp/site/Security/SecurityForms.aspx

PROMOTION STANDARDS
> The Chancery Promotion Standards nightly calculation begins Thursday evening, May 23, 2013 and continues through Friday, June 21, 2013. Prior to Friday, May 24, 2013, no calculated promotion status data exists. For information about Promotion Standards visit Elementary Guidelines Section XIII; Secondary Guidelines Section X.
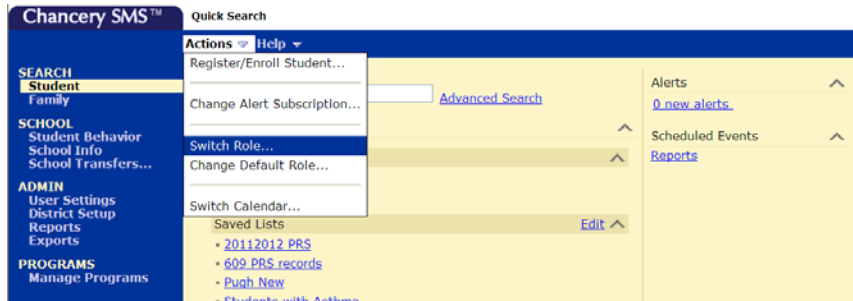
CREATE CLP in CHANCERY
> Log into Chancery SMS using network login credentials
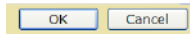

> From the HOME screen, select *Actions>Switch Role*…
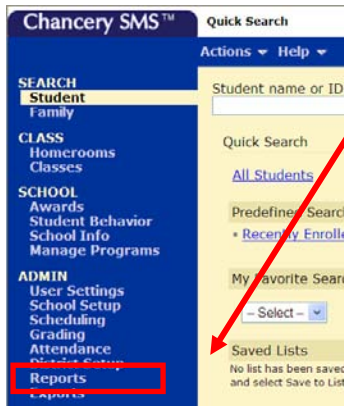
Select one of the following campus-based roles:

Principal
R/E/W w/ Attendance
R/E/W w/Grade Reporting
Register/Enroll/Withdraw
SIS Data
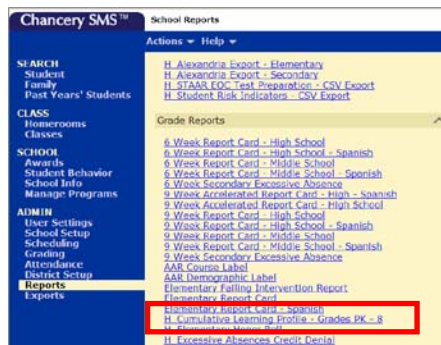Special Pops
Special Pops w/Sp. Ed.
Teacher

Click OK.

On the left menu panel, **click the Reports** link.

Scroll down to the *Grade Reports* category and **click** the *H_Cumulative Learning Profile – PreK- 8* link.

On the Report Options screen, **select the group** of students to include in the report. Promoted, Retained, Unassigned, or All. The Promoted/Retained status displayed on the report is determined by the student's promotion status in Chancery. Students withdrawn on or prior to the last day of school are **excluded** from the report.

To prepare the report for a specific subset of students, use the appropriate filters. A Saved List may also be used to filter the group of students included. Always verify the results, especially when using filters.

> NOTE: The *SP0001 Chancery SMS Basics* online training describes multiple, time-saving features. Viewing the *Creating a Saved List* and *Printing a Report* modules is recommended prior to initiating the CLP report. SIS Online trainings are viewable by all staff with Network and Portal login IDs.

> Log into the HISD portal and visit http://sishelp/site/. Click the Online Training icon. To access eTutor, enter NETWORK login credentials. Click the Online Courses link. Locate the SP0001 training (page 2) and click the link. Following the introduction, multiple lessons are listed. Review all or select relevant topics. Successful completion of the entire module AND the Skill Test is recorded on the user's PeopleSoft transcript.


Although this and other reports should be scheduled to run **during non-school hours**, and retrieved later, this report may be processed during the school day.

> **NOTE:** Please refrain from running any non-attendance related reports during the significant period.

Grade Level filter example

Scheduled Report example
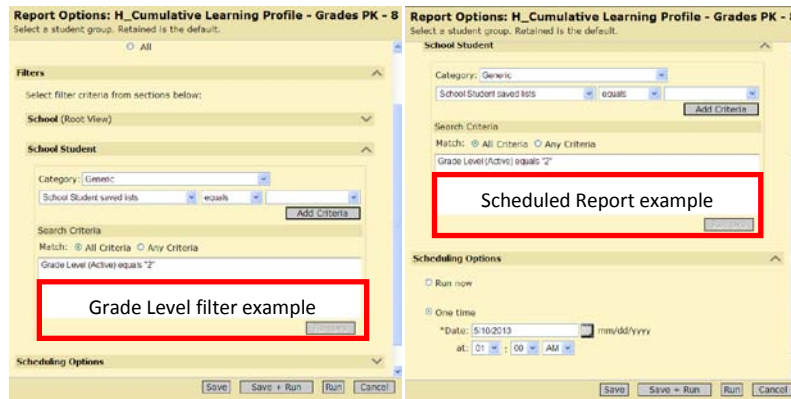
When all Report Options are set, click Run or Save and Run.
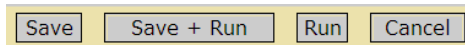
NOTE:
Save – Prompts user to name the report options selected, for future use, without running the report. At runtime, the user selects the saved options name instead of re-entering the options.
Save + Run –Same features as **Save** plus the report starts processing (or is scheduled).
**Run** – Initiates processing (or schedules) the report immediately. User selected runtime options are NOT saved.
Cancel – Returns to the list of reports without saving selected options and does not run the report.

When the Report Status screen appears, c**lick the "X" and close this window**.
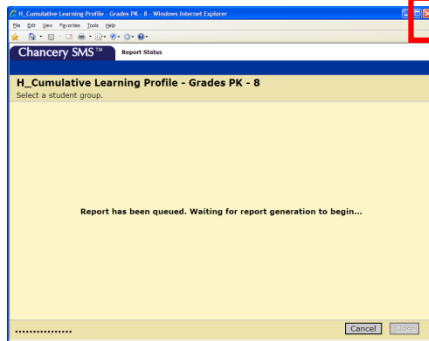
NOTE: Although the window is closed, the report continues processing, allowing users to continue working whether in Chancery or not. Closing the Report Status window triggers a Chancery function to save the report results. Closing the Report Status window is not required. The CLP report is larger than most and can take several minutes to render on screen even after successful completion. When the window is NOT closed and the results finally render, they are not saved. Power interruption, user system error, or unintentional click can also discard the result. Infrequently, reports will indicate successful completion but never render. Closing the Report Status window after initiating the process is good practice.

Return to the Home screen. On the right under Alerts, click the Reports link. This link only appears when the Report Status window is closed prior to report completion or if a report is scheduled.
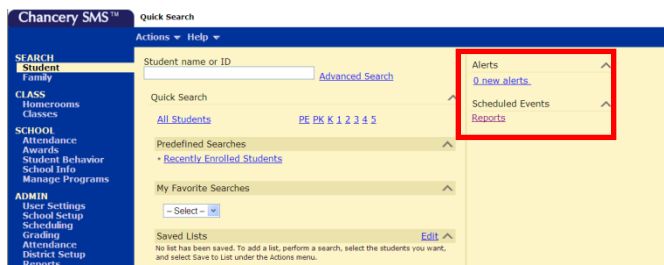
On the Report Management screen the user can verify scheduled reports, check the status of submitted reports, and open the completed report (click the link). In the image below, the first line shows a completed report ready to review/save/print. The second line shows a scheduled report, while lines three and four show reports in progress.

REPORT RESULTS

When run under any approved role other than Teacher, the report result is grouped by homeroom/teacher of record/class, and displays in alphabetic order by student name (last, first). When submitted by a user logged in with a Teacher role, only students in that teacher's active schedule will display, ordered by student last and first names.

VALIDATE, SAVE, PRINT

ALWAYS review this and other report results to validate accuracy. If the results are correct, save and/or print the report as usual.

HELP

If a data error is suspected, verify the student's record in Chancery **first**. Then, if the system data does not match the reported information, please contact the Help Desk by email or phone and submit a trouble ticket. Provide details about the error and two or more related student IDs. If a report fails to complete, please provide a screenshot of the entire error message.

Always include the Server Reference number when submitting **ANY** Chancery-related trouble ticket. Prior to login, it is available on the panel. When logged in, the Server Reference number is located under *Help>About Chancery SMS*….