STATEWIDE ENROLLMENT AND REPORTING SYSTEM (SERS) CTE DUAL-CREDIT STUDENTS

COLLEGE STAFF MANUAL
JUNE 2018
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OVERVIEW

CTE Dual Credit is an industry and education partnership committed to providing a highly-trained and motivated workforce, prepared to pursue lifelong learning in a changing technological society. It includes a rigorous and focused course of study that provides students with essential academic and technical foundations and prepares students with necessary workplace skills.

These courses are offered at many high schools and skills centers across the state in partnership with community and technical colleges. They integrate academics with technical skills to help students prepare for advanced education and careers. Students earn high school and college credit for successfully completing the same course.

Under Carl D. Perkins Title II legislation, CTE Dual Credit must:

- Align to a professional-technical pathway, leading to an associate degree, two-year certificate, or apprenticeship.
- Provide technical preparation in at least one of the following fields:
  - Engineering technology
  - Applied science
  - Mechanical, industrial, or practical art or trade
  - Agriculture
  - Health
  - Business
- Build student competencies in mathematics, science, technology, and communications through a sequential course of study.
- Lead to employment or further education.

The Statewide Enrollment and Reporting System (SERS) is used by CTE Dual Credit consortium members, teachers, college staff, registrars, and students to view and manage information related to participants and courses.
SERS Home Page

The SERS home page is accessible to the public and is the starting point for students, teachers, registrars, consortium staff, and the public. It provides log-in functions as well as access to other information.
Logging Into SERS

Logging into SERS for the First Time

To log into SERS for the first time, you will need to follow the link that the system emails to you when your account is created. Following the link will prompt you to set your password and security questions for account recovery.

The Security Information screen will provide you with your username at the top of the screen.

1. Enter your password in the Password box, making sure to follow the rules on the screen. Then enter the same password in the Compare Password box.

![Security Information Screen]

Your Username is: dthomasg

You need to create a new password, so please follow these rules:

1. At least 10 characters long.
2. Contain at least one upper and one lower case letter.
3. Contain at least one number.
4. Contain at least one of the following special characters: ! # $ % ^ & * - = ? @ _ ~
2. Select three different security questions and enter your answer for each question.

![Security Questions](image)

3. Select the Submit button.

4. The next screen will confirm your submission. Click the Continue button.

![Account Ready](image)

5. Verify your account information and select Save Account.
**Logging into SERS after your First Login**

1. Access the SERS Home Page, at [http://www.ctesers.org](http://www.ctesers.org) and select Staff Sign In.

   ![Sign-in](image)

2. Enter the user name and password provided to you by the person who created your account. If a new account is needed, contact the college consortium director first. For additional assistance, contact State Board staff: [sershelp@sbctc.edu](mailto:sershelp@sbctc.edu).

   ![Sign-in](image)

3. Click the Sign In button
   The Staff Home Page will appear. The menus across the top provide access to SERS functions. The options shown will vary depending on your security level.
**Recovering your User Name**

1. Click the “I forgot my user name” link on the Sign In page

![Sign-in](image)

2. Enter your first name, last name and email address, then click the Submit button.

![Recover Forgotten Username](image)

Your user name will be emailed to you.
**Resetting your Password**

1. Click the “I forgot my password” link on the Sign In page

![Sign-in](Image)

2. Enter your username and email address on the Password Recovery screen and click the Submit button.

![Password Recovery](Image)

A password reset link will be emailed to you.
MANAGING USERS

Users are defined as all users of SERS who are not students. You can search for, add and edit user records, and control user access to specific system features.

Before you add a user, search the list of users so that you don’t create a duplicate record.

Searching for Users

To search for users:

1. Open the Personnel menu. Then select Search Users.
2 Enter search terms in the search boxes.
   To include inactive users in your search, check the Include Inactive checkbox.

3 Click the Search button
   The results display below the search form. If you have not entered any search terms,
   all users will be displayed.
Working with the User Search Results

From the search results, you can:

1. **Sort the results based on the data in each column by selecting the column header.**

   ![Table]

   12
   + User Name (click to View/Edit) + Role + Last Login + Email + Inactive
   (PITZEL)-UREN, ERIN Teacher 6/12/2014 appdev@sbcctc.edu 
   ABNEY, WAYNE Teacher appdev@sbcctc.edu 
   AGUILERA, NANCY Teacher 1/6/2016 appdev@sbcctc.edu 

2. **Control the number of items displayed by selecting an option from the Number of Results Per Page drop-down field.**

   ![Dropdown]

   Number of Results Per Page 50

3. **Navigate to the next page of search results.**

   ![Pagination]

   74 Records Found
   12
   + User Name (click to View/Edit) + Role
   (PITZEL)-UREN, ERIN Teacher
   ABNEY, WAYNE Teacher
   AGUILERA, NANCY Teacher

4. **Click on a user’s name to view or edit the Account Profile for that user.**

   ![Highlighted User]

   74 Records Found
   12
   + User Name (click to View/Edit) + Role
   (PITZEL)-UREN, ERIN Teacher
   ABNEY, WAYNE Teacher
   AGUILERA, NANCY Teacher
Adding a User

Only a user with Security Editor rights can create new users. Security Editor rights are given to the initial CTE Dual Credit staff members entered into SERS by development staff. Those staff members can, in turn, assign security rights to users they create.

To add a user:

1. Select the Personnel menu, then select Add User.
2. **On the Add User screen, enter the user’s information.**
   Required information is marked with a red asterisk (*)

   ![Add User Form]

   a. The user role you select determines the type of functionality that person will have when they log in to SERS. Depending on what type of user you are creating, you may see slightly different options. For example, when you create a registrar, you will need to identify which college the registrar belongs to.

   If a user needs multiple roles to perform multiple functions, you will need to create multiple user accounts for that person, selecting the appropriate role for each account. A different username is associated with each account, but users may choose to use the same password for their different accounts.

   b. To create an account with an expiration date for any user role, enter a date in the Account Expires field.

   c. Enter any comments in the comments field.

3. **Click the Save User button.**

   A confirmation message will display on the screen that the new user was created. The screen will also change to an Edit User screen, and a Reset User button will appear at the bottom of the screen.

   An email will be sent to the new user with a link for them to create their password and set up their security questions.

4. **To create another user, select Add User from the Personnel menu again.**
**Understanding Staff Security Levels**

Security rights are used to control what a user sees and is able to do in SERS. You can assign a user any of six different security-rights levels. You can assign none, one or all levels. Note that they should be assigned only on an as-needed basis.

The staff security levels are:

<table>
<thead>
<tr>
<th>Level</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default</td>
<td>Gives read-only access. Users with this security level cannot edit record information. This security level is given to someone who, for example, needs access to SERS reports but has no need to create or edit data.</td>
</tr>
<tr>
<td>Student Editor</td>
<td>Allows the user to create and edit Student profile accounts. The user can view the student’s college ID, Social Security number (SSN), and state student ID.</td>
</tr>
<tr>
<td>Articulation Editor</td>
<td>Allows the user to create and edit any information that makes up a High School class and college course relationship, known as an articulation.</td>
</tr>
<tr>
<td>Security Editor</td>
<td>Allows the user to create and edit user accounts.</td>
</tr>
<tr>
<td>Impersonate</td>
<td>Allows the user to log in as themselves and yet perform SERS activities on behalf of someone else, such as a teacher, registrar, or other staff person.</td>
</tr>
<tr>
<td>Maintenance</td>
<td>Allows the user to enter and edit information about his or her consortium. The user can also enter the time frame during which students can register for classes, teachers can assign grades and credits to students, and registrars can transcribe students.</td>
</tr>
<tr>
<td>Contact</td>
<td>Any Staff user with this check box active will show up in the Staff Contacts section of the Contact Us page.</td>
</tr>
</tbody>
</table>
Editing User Information

Only CTE Dual Credit staff with Security Editor rights can edit account information. However, even with Security Editor rights, you cannot change the user name or user role.

If you need to change a user’s role, inactivate the User and create a new user account for that person.

To edit a user’s profile:

1. Search for the user you would like to edit
2. In the User Search Results, click on the user’s name.

![User Search Results Table]

<table>
<thead>
<tr>
<th>User Name (click to View/Edit)</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>YORK, TERESA</td>
<td>Teacher</td>
</tr>
<tr>
<td>YENNEY, SHELLEY</td>
<td>Teacher</td>
</tr>
<tr>
<td>WOLCOTT, HOLLY</td>
<td>Teacher</td>
</tr>
<tr>
<td>WALKER, ABIC</td>
<td>Teacher</td>
</tr>
<tr>
<td>USER, DEMONSTRATION</td>
<td>College CTE Staff</td>
</tr>
</tbody>
</table>
3. Edit the information in the Edit User screen.

If you make an error when editing information, click the Reset Form button. The user information will revert to its last saved state.

4. Click the Save User button.
Inactivating a User

Once a user has been created, you cannot delete the user from SERS or change that user’s role. If a user will no longer be using SERS, or their role has been changed, you must mark them Inactive. They will then no longer show up in the search results.

There are two different ways to mark a user inactive:

**Inactivating a user from User Search results**

1. **Search for the user** you would like to inactivate.
2. In the User Search results, check the Inactive checkbox at the end of the row where the user’s name appears.

The user record will become inactive and disappear from your search results as soon as you check the box, unless you also included inactive users in your initial search.

**Inactivating a user from the Edit User screen**

From the Edit User screen,

1. Check the Account Inactive box
2. Click the Save User button
Reactivating a User

You can reactivate an inactive user in the same ways that you inactivate a user.

**Reactivating a user from User Search results**

1. **Search for the user** you would like to reactivate. Make sure to check the Include Inactive check box.

2. In the User Search results, **uncheck the Inactive checkbox at the end of the row where the user's name appears.**

**Inactivating a user from the Edit User screen**

From the Edit User screen,

1. **Uncheck the Account Inactive box**

2. **Click the Save User button**
Resetting User Passwords

To reset staff passwords:

1. Search for the user

2. Open the user account by selecting the user name in the search results.

3. Click the Reset Account button.

4. A window will pop up, asking if you would like to proceed. Click OK

5. The user will receive an email with a link to reset their password and security questions.
Sending Bulk Email to Users

The Staff Bulk Email function allows you to send email to multiple users at the same time.

1. **Open the Personnel menu. Then Select Staff Bulk Email in the Site User section of the menu.**

![Personnel menu](image)

2. **Select a filter to narrow your audience.** Note that only one filter may be selected. Different filters provide additional options for further narrowing your audience.

![Bulk Staff Email](image)
3. Apply additional selection criteria to your filter, if available.

![Select a staff type](image)

4. Enter your email Subject, Message Body and Signature.

In your Message Body be sure to provide an email address and instructions for how to contact you. The message will be sent from an automated address, and if users simply hit Reply to the email, you will not receive the response.

Messages are sent in plain text. HTML formatting is not supported.

If there are multiple users with the same email address, the message will only be sent to the email address once, to avoid duplication.
5. **Select the Count Emails button to check how many messages you will be sending.**
   This is a good way to check to see if you will be reaching approximately all of the individuals you expect to be reaching.

6. **Select the Send Mail button to send your message.**

7. **A popup window will ask you to confirm that you would like to send the message.**
   Click Yes to send your message. Once your message is sent, the form will reset to allow you to continue composing messages.
USING IMPERSONATE

The Impersonate function allows you to perform work on behalf of someone who has a different role from yours, for example, a teacher on long-term leave who needs to have credit assignments made, or a registrar who needs to transcribe students.

To use this function, you need to have Impersonate Rights.

To use the Impersonate function:

1. **Open the Impersonate menu**

2. **Select the Role you want to impersonate from the Role dropdown**

   ![Impersonate Other User](image)
3. Select the user you would like to impersonate from the User Name dropdown. Note that these are the first and last names of users, and not the unique usernames associated with each account, so you may see duplicate names on the list. These duplicate names will likely have different roles assigned to them.

4. Click the Impersonate button

5. You will see a banner at the top of the screen that reads [Your name] as [Person you are impersonating] at [Your institution].

6. To stop impersonating, click Logout. You will be returned to your own account.
WORKING WITH ARTICULATIONS

An articulation represents the relationship between High School classes and College courses. This relationship includes:

- Teachers
- High School classes
- High School class offerings
- College courses

All of these components must be entered into SERS in order for students to successfully register for an articulation.

Managing Teacher Records

To add a teacher to SERS, edit a teacher’s profile, or remove a teacher, you must have Security Editor rights.

Before you add a teacher, search for the teacher to make sure the user does not already exist.

An initial user account for a teacher is created like any other user. See the Adding a User section in this guide. Once the teacher’s user account has been created, you may need to associate the teacher with a high school.

**Associating a Teacher with a High School**

1. Search for the user you would like to edit
2. In the User Search Results, click on the user’s name
3. In the Edit User screen, select the high school from the Available High Schools.

4. Click the right arrow button to add the selected high school to the Assigned High Schools list. You may add more than one high school to the Assigned High Schools list. If you add a high school to the Assigned High Schools list that you wish to remove, select the high school in the Assigned High Schools list and click the left arrow button to remove it.

5. Click the Save User button
Managing High School Class Records

A High School Class has a title and is associated with a specific school; however, it does not have a teacher or a time period when it will be taught. A High School Class Offering, on the other hand, consists of a High School Class with a teacher assigned to it and an academic year in which it will be taught. A class can exist without an offering, but an offering cannot exist without a class.

High School Class Offerings are the only parts of an articulation that are based on a specific academic year. This is different than Articulations, Classes and Courses, which are all open-ended and do not have to be re-created every year. To make an articulation available in a new academic year, new High School Class Offerings must be created for high school classes.

Note: to make an articulation available for class registration, the articulation and all associated classes, courses and offerings must not be marked as inactive. If any part is inactive, the entire articulation is inactive.

When you are ready to activate a new academic year, contact SBCTC at techprep@sbctc.edu. When the request is received, the Help Desk staff will roll over any class offerings from the previous year that are not marked inactive. This will save time in preparing offerings for ongoing articulations. Class offerings may also be created manually as needed.

To add or edit High School classes, you must have Articulation Editor rights.

Before you add a High School class, search for the class to make sure it does not already exist.
**Searching for a High School Class**

1. Open the Articulations menu. Then select Search HS Class

![Articulations menu with Search HS Class highlighted]

2. Enter your search terms using the dropdown lists and search boxes. Leaving the fields blank will return all classes except inactive classes. To include inactive classes, check the Include Inactive box.

![Search High School Classes form]

3. Click the Search button
Adding a High School Class

1. Open the Articulations menu. Then select Add Class

![Articulations menu](image)

2. Enter the Class information in the Add High School Class screen

![Add High School Class](image)

   a. Select the School District
   
   b. Select the High School
   
   c. Enter the Class Name
   
   d. Select the Classifications of Instructional Programs (CIP) name if you know it
      Though this field is not required, it is highly recommended that you enter a
      value in the CIP Name field. You can download and view the CIP list using the
      link above the CIP Name field.

3. Click the Save Class button
4. A popup window will confirm class creation and ask if you would like to continue creating classes. **Click Yes to create another class. Click No if you are done creating classes.**

![New Class](image)

**Editing a High School Class**

1. **Search for the class**

2. **Click on the name of the class in the search results**

3. **Edit the class information.** A banner at the top of the screen indicates that you are in Edit Record mode.

![Edit High School Class](image)

4. **Click the Save Class button**
**Inactivating a High School Class**

Once a High School Class has been created, you cannot delete it from SERS. If a High School Class will no longer be used in SERS, you must mark it Inactive.

1. **Search for the class**
2. **Check the Inactive box at the end of the row for the class in the search results**

You can also mark the class as inactive from the Edit High School Class screen by checking the Inactive Class check box and then clicking the Save Class button.
Reactivating a High School Class

You can activate a High School Class by unchecking the Inactive box for the class.

1. **Search for the class**, Make sure that you check the Include Inactive box before submitting your search.

2. Uncheck the Inactive box at the end of the row for the class in the search results.

You can also activate the class from the Edit High School Class screen by unchecking the Inactive Class check box and then clicking the Save Class button.
Managing High School Class Offerings

To create a High School Class Offering you will first need to

- [Create a High School Class](#)
- [Create a Teacher](#)

To create class offerings, you must also have [Articulation Editor rights](#).

Before you add a High School Class Offering, search for the class offering to make sure it does not already exist.

**Searching for a Class Offering**

1. Open the Articulations menu. Then select Search Offerings
2. Enter your search terms using the dropdown lists and search boxes. Leaving the fields blank will return all offerings except inactive offerings. To include inactive offerings, check the Include Inactive box.

![Search For High School Class Offerings]

3. Click the Search button. The search results display below the form.

**Creating a Class Offering**

1. Open the Articulations menu. Then select Add Offering
2. Select values for each of the dropdowns. All fields are required.

3. Click the Save Offering button

4. A popup window will confirm class offering creation and ask if you would like to continue creating class offerings. Click Yes to create another class offering. Click No if you are done creating class offerings.
**Editing a Class Offering**

1. **Search for the class offering**

2. Click on the name of the class offering in the search results.

3. **Edit the course offering.** If students are already registered for the class offering, you will only be able to edit the Teacher. If there are no students registered for the class offering, you can change the Academic Year and the Teacher.

4. Click the Save Offering button
Inactivating a Class Offering

Once a Class Offering has been created, you cannot delete it from SERS. If a Class Offering will no longer be used in SERS, you must mark it Inactive.

1. Search for the class offering

2. Check the Inactive box at the end of the row for the class offering in the search results

You can also mark the class offering as inactive from the Edit Class Offering screen by checking the Inactive Offering check box and then clicking the Save Offering button.
Reactivating a High School Class Offering

You can activate a High School Class Offering by unchecking the Inactive box for the class.

1. **Search for the class offering,** Make sure that you check the Include Inactive box before submitting your search.

![Search For High School Class Offerings](image)

2. **Uncheck the Inactive box from the end of the row for the class offering in the search results.**

![Edit Class Offering](image)

You can also mark the class offering as active from the Edit Class Offering screen by unchecking the Inactive Offering check box and then clicking the Save Offering button.
Managing College Course Records

To add or edit a college course, you must have Articulation Editor rights.

Before you add a college course, search for the course to make sure it does not already exist.

**Searching for a College Course**

1. Open the Articulations menu. Then select Search Courses
2. Enter your search terms using the dropdown lists and search boxes. Leaving the fields blank will return all offerings except inactive offerings. To include inactive offerings, check the Include Inactive box.

3. Click the Search button. The search results display below the form.

Creating a College Course

1. Open the Articulations menu. Then select Add College Course.
2. Enter the required information to create the College Course

For course credits, you must either enter a value in the Credits box, or select Variable Credits and enter minimum and maximum credit values for the course.

To assign a range of Variable Credit to a college course, select the Yes radio button and enter the minimum and maximum number of credits a student can earn for that course.

If the College Course does not allow variable credits, select the No radio button and enter the number of credits awarded in the Credits field.
3. Click the Save Course button

4. A popup window will confirm college course creation and ask if you would like to continue creating college courses. Click Yes to create another college course. Click No if you are done creating college courses.
Editing a College Course

1. Search for the college course

2. Click on the name of the college course in the search results.

3. Edit the college course

4. Click the Save Course button
**Inactivating a College Course**

1. Search for the college course

2. Check the Inactive box at the end of the row for the college course in the search results

You can also mark the college course as inactive from the Edit College Course screen by checking the Inactive check box and then clicking the Save Course button.
Reactivating a College Course

You can activate a College Course by unchecking the Inactive box for the class.

1. **Search for the college course.** Make sure that you check the Include Inactive box before submitting your search.

![College Course Search](image)

2. Uncheck the Inactive box from the end of the row for the college course in the search results.

![Edit College Course](image)

You can also mark the college course as active from the Edit College Course screen by unchecking the Inactive Course check box and then clicking the Save Course button.
Managing Articulations

To create or edit articulations, you must have Articulation Editor rights.

Before you create an articulation, search for the articulation to make sure it does not already exist. Your search can include inactive articulations. An articulation may be inactive for a number of reasons such as:

- It expired and is not being used any more.
- It is full, and so no more students can register for it.
- It was created in advance and now needs to be made active so that students can register for it.
- A class or course was marked inactive, in which case the articulation was also made inactive.

Searching for an Articulation

1. Open the Articulations menu. Then select Search Articulation
2. Enter your search terms using the dropdown lists and search boxes. Leaving the fields blank will return all articulations except inactive articulations. To include inactive articulations, check the Include Inactive box.

3. Click the Search button. The search results display below the form.
Creating an Articulation

1. Open the Articulations menu. Then select Add Articulation
2. **Enter Articulation information into the Add Articulation screen**

![Add Articulation Screen](image)
a. Enter an Articulation Name.

b. In the Create Date and Expire Date fields, enter the date the articulation agreement was made and when the agreement ends. This is not required, but it allows you to generate a report that displays expired articulations.

c. From the Available Career Clusters box, select the career cluster associated with the articulation. Use the right arrow button ▶ to move it to the Assigned Career Clusters list box.

d. From the Select College dropdown list, select the college the articulation is associated with. Courses at the selected college appear in the Available College Courses box.

e. From the Available College Courses box, select the course or courses you want to associate with the articulation.

f. Click the right arrow button ▶ to move the courses into the Assigned College Courses box.

g. From the Select High School dropdown list, select the high school the articulation is associated with. Classes at that high school appear in the Available High School Classes box.

h. From the Available High School Classes box, select the class or classes you want to associate with the articulation.

i. Click the right arrow button ▶ to move the classes into the Assigned High School Classes box.

j. Use the Comments field to record any supplementary information about the articulation.

k. Click the Save button.

If an articulation already exists with the same name, a message appears asking if you want to continue.

If you select Yes, you will be allowed to continue creating the articulation.

If you select No, change the name and then click the Save Changes button again.
I. A popup window will confirm the articulation was created and ask if you would like to continue creating articulations. **Click Yes to create another articulation. Click No if you are done creating articulations.**

![New Articulation](image)

**Editing an Articulation**

1. **Search for the articulation**

2. **Click on the name of the articulation in the search results.**

3. **Edit the articulation.**

4. **Click the Save Articulation button**

   If students are currently "In Process" in an articulation, the classes and courses cannot be changed.

**Editing an Articulation’s Associated College Courses or High School Classes**

To edit an articulation’s college course or high school class, you can **search for the course** or **search for the class** and edit the course or class.

Alternatively, you can access the course and class editing screens from within the articulation’s Details view.

1. **Search for the articulation**

2. **Click on the articulation details in the search results**

3. **A popup window of the Articulation Details provides links to the associated classes and courses. Click on the name of the class to edit the class, or click on the name of the course to edit the course.**
Inactivating an Articulation

Once an articulation has been created, you cannot delete it from SERS. If an articulation will no longer be used in SERS, you must mark it Inactive.

1. **Search for the articulation**

2. Check the Inactive box at the end of the row for the articulation in the search results

You can also mark the articulation as inactive from the Edit Articulation screen by checking the Inactive Articulation check box and then clicking the Save Articulation button.
**Reactivating an Articulation**

You can activate an articulation by unchecking the Inactive box for the articulation.

1. **Search for the articulation**. Make sure that you check the Include Inactive box before submitting your search.

2. Uncheck the Inactive box from the end of the row for the articulation in the search results.

You can also mark the articulation as active from the Edit Articulation screen by unchecking the Inactive Articulation check box and then clicking the Save Articulation button.
PERFORMING CONSORTIUM MAINTENANCE

The Staff Maintenance Menu allows users with Maintenance Editor rights to perform routine maintenance functions and manage consortium information such as contact information, fee structure, registration information, and dates associated with activity windows.

Editing Consortium Information

Open the Maintenance menu. Then select Consortium Information.

Editing General Information

1. Edit name, address and other contact information in the General Information area.
2. The Grade Level Option was set when your consortium was created, and can only be changed by the State Board help desk.

You can view your Grade Level Option details by clicking on the Grade Level Option link. The link will open in a new window.

![Grade Level Option](image)

**Editing Fees**

The Fees section of the Consortium Information screen is where you enter information about the fees your consortium charges to students for articulations. Some colleges charge fees and some do not. Those that do may charge a one-time fee, or an annual fee. If the Fee Based checkbox is checked, other items become visible and active on the screen.

![Fees](image)

If there is a fee, the amount and frequency is displayed for the student during the registration process. The Checks Payable To field, Accept Credit Cards checkbox, and the Attention field are used in the Registration Confirmation screen. They are also displayed in a printable form that students see after they register for a class.
**Editing Registration Information**

The Registration Information section is used to create the registration confirmation form that a student prints and sends. For example, if you require that a parent sign the registration form, then a parent-signature line will appear on the registration-confirmation form.

The fee and registration information is also used to enforce the business rule, where applicable, that a student will not be transcribed at the college unless fees have been paid and registration completed.

**Click the Save button when you have finished editing the consortium information.**

**If you have made changes that you do not wish to save, click the Reset Form button to leave the consortium information unchanged.**
Consortium Partners

The Consortium Partners screen allows users to see the name and mailing address of each School District and College office in their consortium.

Open the Maintenance menu. Then select Consortium Partners.
Understanding Consortium Activity Windows

The Consortium Activity Windows screen allows you to enter open and close dates for student registration, grading and transcripts. Use this screen to set an activity window to open and close on specific dates. Also, if your consortium requires mail-in registration, you can use this screen to specify the deadline which appears on a student’s mail-in registration form. If your consortium doesn’t require a mail-in registration form, the Due Dates section on this screen will not be displayed.

You might set an activity window to open and close if, for example, you want to control when:

- Teachers can enter grades.
- Students can register for an articulation.
- Registrars can transcribe students.

Setting an Activity Window

1. Open the Maintenance menu. Then select Set Activity Windows
2. Enter Window Open and Window Close dates for each window type

![Set Consortium Activities]

3. From the Setting dropdown, select Auto

4. Click the Save button
Overriding Activity Windows

You can override the Activity Window dates by using the Setting dropdown.

1. Open the Set Activity Windows screen

![Set Activity Windows screen]

2. Select the override state from the Setting dropdown. Windows can be set to permanently open or permanently closed. If the Setting is set to open or closed, the Status column will update to reflect this, regardless of the window dates.

![Activity Window Status]

3. Click the Save button

Since these activity windows allow or prohibit certain functions in SERS, it is important to keep them up to date.
MANAGING STUDENT USERS

To manage student users, you must have Student Editor rights.

Before you add a student, search the list of students so that you don’t create a duplicate record.

Searching for a Student

1. Open the Personnel menu. Then select Search Students
2. Enter search terms in the search boxes.

![Search For Students form]

3. Click the Search button

The results display below the search form. You should enter at least one search term, otherwise your search will likely return too many records to display.

<table>
<thead>
<tr>
<th>Name (click to View/Edit)</th>
<th>Home High School</th>
<th>SERS ID</th>
<th>Birth Date</th>
<th>Current Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eisenhower</td>
<td></td>
<td>TPS-35-6445</td>
<td></td>
<td>Out of School</td>
</tr>
<tr>
<td>Eisenhower</td>
<td></td>
<td>TPS-35-5945</td>
<td></td>
<td>Out of School</td>
</tr>
<tr>
<td>Eisenhower</td>
<td></td>
<td>TPS-35-2179</td>
<td></td>
<td>12</td>
</tr>
<tr>
<td>Davis</td>
<td></td>
<td>TPS-31-1975</td>
<td></td>
<td>Out of School</td>
</tr>
<tr>
<td>Eisenhower</td>
<td></td>
<td>TPS-36-5889</td>
<td></td>
<td>Out of School</td>
</tr>
<tr>
<td>Eisenhower</td>
<td></td>
<td>TPS-31-2358</td>
<td></td>
<td>Out of School</td>
</tr>
<tr>
<td>Eisenhower</td>
<td></td>
<td>TPS-35-2090</td>
<td></td>
<td>12</td>
</tr>
<tr>
<td>Davis</td>
<td></td>
<td>TPS-31-7396</td>
<td></td>
<td>Out of School</td>
</tr>
<tr>
<td>Davis</td>
<td></td>
<td>TPS-31-8004</td>
<td></td>
<td>Out of School</td>
</tr>
<tr>
<td>Yakima Valley Technical Skills Center TPS-34-6698</td>
<td>Out of School</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Davis</td>
<td></td>
<td>TPS-33-7215</td>
<td></td>
<td>Out of School</td>
</tr>
<tr>
<td>Davis</td>
<td></td>
<td>TPS-31-6592</td>
<td></td>
<td>Out of School</td>
</tr>
</tbody>
</table>
Adding a Student

1. Open the Personnel menu. Then select Add Student

2. Enter a username in the Username field

3. Navigate away from the Username field by clicking into another field or hitting the Tab or Enter key

   This will trigger SERS to check the availability of the username. You must enter an available username to access the rest of the form fields.
4. Follow the instructions on the page to complete the rest of the form

5. Click the Save Student button
6. The Edit Student screen will open. **Enter the information in the Edit Student screen, or enter it later by searching for the student and clicking on their name in the search results.**
Editing a Student’s Profile

1. Search for the student
2. Click on the student’s name in the search results

<table>
<thead>
<tr>
<th>Name (click to View/Edit)</th>
<th>Home High School</th>
<th>SERS ID</th>
<th>Birth Date</th>
<th>Current Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student, Demonstration</td>
<td>Yakima School of the Arts</td>
<td>TP3-38-3800</td>
<td>1/1/1988</td>
<td></td>
</tr>
</tbody>
</table>

3. Edit the student profile

4. Click the Save button
 Resetting a Student Password

This process can be used to reset a student’s password and security questions, or to send a student their initial setup email, if you unchecked the Send Sign-in Information Now box when you first added the student.

1. Search for the student
2. Click on the student’s name in the search results
3. Scroll to the bottom of the page and click the Reset Account button
4. A window will pop up, asking if you would like to proceed. Click Reset Account to proceed.
5. The student will receive an email with a link to reset their password and security questions.
Managing Fees and Registration

Some consortiums charge students fees to register for articulations, and some consortiums require mail-in registration forms. The Fees & Registrations screen allows you to indicate that a student has paid the required fees and that a mail-in registration form has been received.

1. **Search for the student**

2. **Click on the student’s name in the search results**

   ![Student Information](image1.png)

3. **Click on the Fees & Registrations button on the Edit Student page**

   ![Edit Student](image2.png)

4. **Update Fees and Registration information**

   ![Fees & Mail-In Registration](image3.png)

5. **Click the Save Changes button for any section of the screen in which you made changes**
Viewing Registration History

1. Search for the student

2. Click on the student’s name in the search results

3. Click on the Registration History button on the Edit Student page

4. Click on the Edit link to edit the student’s registration, or click on Details to view the details of the articulation for which the student is registered.
Editing Registration History

If you have Student Editor rights, you can:

- Reassign a student to a new course offering.
- Edit the student’s class grade and status.
- Edit variable credits.
- Identify if the student has declined articulation credits.

To edit a student’s registration history:

1. **Search for the student**
2. **Click on the student’s name in the search results**
3. **Click on the Registration History button on the Edit Student page**
4. **Click on the Edit link next to an articulation**
5. Follow the instructions on the Edit Registration page

Articulation Name: Ah 108 Communications & Legal Concepts In Health Care - Status: Not Attained

College | College Course | Course Credits | Earned Credits
---|---|---|---
Yakima Valley CC | AH 108 Communications & Legal Concepts in Health Care | 5 | 0

6. Changes are posted when they are made. There is no save button, but a banner appears at the top of the page to confirm changes.

A student’s registration record cannot be deleted once a related student-course record has been transcribed.
Sending Bulk Email to Students

The Bulk Email function allows you to send email to multiple students at the same time. You must have Student Editor rights to access this screen.

1. Open the Personnel menu. Then Select Bulk Email in the Student section of the menu.

2. Select a filter to narrow your student audience. Note that only one filter may be selected.
• **Missing Fees** – Email will be sent to all students who have registered for an articulation but have not sent in the required fee.

• **Missing Mail-ins** – Email will be sent to all students who have registered for an articulation but have not sent in the required paperwork.

• **All Current and Future Registrations** – Email will be sent to all students registered in the current or future academic years.

• **By Year Transcribed** – Email will be sent to all students who were transcribed in a specific academic year.

• **By School District** – Email will be sent to all students with articulation registrations in your consortium for a specific school district (as declared by the student’s home high school profile).

• **By High School** – Email will be sent to all students with articulation registrations in your consortium for a specific high school.

3. **Select the grade levels to which you would like to send email.** You may select all boxes, or just one.
4. Enter your email Subject, Message Body and Signature.

In your Message Body be sure to provide an email address and instructions for how to contact you. The message will be sent from an automated address, and if students simply hit Reply to the email, you will not receive the response.

Messages are sent in plain text. HTML formatting is not supported.

If there are multiple students with the same email address, the message will only be sent to the email address once, to avoid duplication.

5. Select the Count Emails button to check how many messages you will be sending. This is a good way to check to see if you will be reaching approximately all of the students you expect to be reaching.

6. Select the Send Mail button to send your message.

7. A popup window will ask you to confirm that you would like to send the message. Click Yes to send your message. Once your message is sent, the form will reset to allow you to continue composing messages.
Using Bulk Process Mail-In Registrations

The Bulk Process Mail-In Registration screen allows you to see whether students have paid required fees or if their mail-in registration forms have been received. You must have Student Editor rights to access this screen.

1. Open the Personnel menu. Then select Bulk Process Mail-ins.

2. Enter search terms in the form.

3. Click the Search button. If you leave the form blank, all records will be returned. Search results appear below the form.
4. Click the Edit link next to a student name to edit their Fee or Registration status

Changes to Fee Status must include a date or the status change will not be saved.

5. Click the Save button