

# Student Management

- [Add Address And Contact Under Student Information](#)
- [Add Comments Under Student Information](#)
- [Add Documents Under Student Information](#)
- [Add Enrollment Information Under Student Information](#)
- [Add Family Information Under Student Information](#)
- [Add Medical Information Under Student Information](#)
- [Add Student General Information](#)
- [Delete A Student Record](#)
- [Disable A Student Turn Off Portal Access](#)
- [Drop A Student From School](#)
- [Group Assign Student Information](#)
- [How To Enroll A Student In Multiple Schools With A Home School And Away Schools In CrownSIS](#)
- [How To Use Search Filters In CrownSIS For Efficient Student And Staff Data Retrievals](#)
- [Re Enroll Students](#)
- [Transfer A Student From One School To Another Within CrownSIS](#)

# Add Address And Contact Under Student Information

In this section, the User can add the address details of the Student. You can find it just beneath the student information sub-menu.

Menu >> Student >> Student Information >> Address & Contact

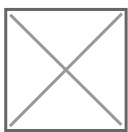
Here you get a few sections with different fields starting with Student Home Address.

In this section, you need to fill in the student's home address like -

- Street Address
- Country
- State
- City
- Zip Code
- Bus no.
- Bus pickup location and drop-off location

Then you also get the option of adding a student mailing address. You can either choose the address to be the same as the Home Address or can add another Address manually if any.

At the bottom is the student's Personal Contact Information section. In this section, you can add the student's contacts and social media handles and then click **Submit** to save.



# Add Comments Under Student Information

The **Comments** section in the student record is a very useful tool. Here the staff members can add opinions and observations about a student and that will be available to all the other staff members. You can add multiple comments and they will show as individual entries.

Select a student record and click on the Comments tab and **+Add Comment**

Below is an example of an observation entry.



# Add Documents Under Student Information

To add documents to a student record, select the student. Here you can add pdf files, MS Office files, and most image files. The file size has to be less than 20 megabytes per file.

The system will show the user who uploaded the document along with date and time.

Click **Upload Document** and you will be able to drag and drop files into the uploader. Click **Upload Selected Files** to complete upload.



# Add Enrollment Information Under Student Information

Student's School and Enrollment Information are critical so inspect the field values closely.

**Enrollment Calendar** - The system will use the default calendar. You can choose to associate the student to any academic calendar. The calendar will be used for attendance marking.

**Rolling/Retention Option** - This field is set to Next grade at current school by default assuming that the student will get promoted to the next grade level.

**Section** - If your school has many students and needs to group them into sections then use this field to assign a section to the student.

**Estimated Graduation Date** - This date can be used to determine the student's cohort.

There are several eligibility and accommodation switches that can be used as per requirements. The options are searchable also.

**School** - The student record from the general information will default to your school in the system. CrownSIS allows multiple school enrollment for students. Click on the **+Add Enrollment Info** to add an enrollment to a second school.



*Sometimes a student is enrolled in a home school but also attends a secondary school for special courses. You can use this section to capture all enrollments.*

**Grade Level** - Select the grade level the student is enrolled in the current school year.

**Enrollment Date** - This is the date when the system recognizes the student to be active in the school. Therefore make sure the date is correct, otherwise, the student will not be available for scheduling.

**Enrollment Code** - This code is customizable and you can do so from the Setting menu under Students >>Enrollment Codes.

**Exit Date and Code** - This information is often required for reporting purposes especially when a student drops out of school before graduation.

If a student is transferring out to a school that is within the system, you can put an exit code "Transfer Out" and select the new school. The student will automatically get enrolled in that school and the student's record will be available to that school's staff.

Additionally, as a student gets promoted from one grade to the next, the enrollment history will be displayed in this section.



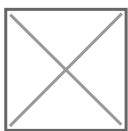
# Add Family Information Under Student Information

Select a Student from the list and click on the **Family Information**. To add contact click on '+ **Add Primary Contact** ' for secondary contact click on '+ **Add Secondary Contact** '. Also by clicking on '+ **Add Other Contacts** ' you can add more contacts.

When clicked on one of the above you will find a popup with the fields like:

1. Salutation
2. First Name
3. Middle Name
4. Last/ Family Name
5. Suffix
6. Contact Relationship
7. Custody of Students ( Yes/ No)

Before you start entering new data, try and look up the contact and see if the parent information is already present in the system or not. If present, you can simply link the user.

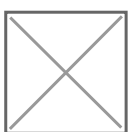


*Remember if the custody of the student is set to "no", the that parent will not see the student's address information in the parent portal*

Using the 'pen' icon you can now edit the contacts of the family members.

Using this icon here you can delete a contact.

Besides the Contact tab is the Sibling Info tab user can add Sibling Information by clicking on '+ **Add Sibling** '



Enter **First** and **Last Name** and click **Search** to find a student to link as a sibling. You can turn on the **Search All Schools** switch to search for a student to link. If no students are found, then you have to enter a student via add student function and then link that student as a sibling.

# Add Medical Information Under Student Information

To add students' medical information, click on the Medical Info tab and fill out the form.

Select the Activities tab, here you can add a student's medical information like-

1. Alert Information
2. Medical Notes
3. Immunization/ Physical Record
4. Nurse Visit Record

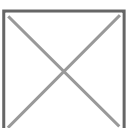
Click on '+' to add the required notes as you see in the image below.



*Note: Whatever data you add to the critical alert section will be shown on the student profile photo with a + sign. If you hover your mouse over it, it will display the alert.*

Select the Provider Information tab, here you can add a student's medical provider information like-

1. Primary Care Physician and relevant details
2. Dentist's information
3. Vision provider's information



# Add Student General Information

New students can be added in three ways in CrownSIS.

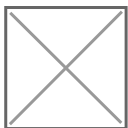
1. From Dashboard by clicking ' + **icon** ' from the top-right corner.
2. Clicking on the ' + **Add New** ' button on top of the student list view
3. Clicking on the drop-down arrow key of the +Add New button will provide an option to import students via Excel sheet.



If you click on +Add New student, you will get the student data entry form with the following categories:

1. General Information
2. Enrollment Information
3. Address & Contact Information
4. Family Information
5. Medical Information
6. Comments
7. Documents
8. Special Category, if any.

Start with **General Information**. You can add only the first and last name and click on Save & Next to go to the enrollment section. The mandatory fields have been kept to the minimum to assist in rapid student data entry.



To grant portal access to a student, slide the toggle switch to the on position.

The email address entry field will open up. Enter the address and save.



After saving the student record, you will see an option to send an email to set a password. When clicked, the student will get a link to create the password. Once the password is set, the student will be able to use the email address and the password to log in to the student portal.

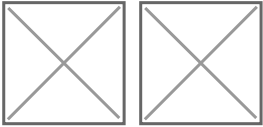


Next, continue to add the [Enrollment Information of the Student](#)

# Delete A Student Record

How to delete a Student record in CrownSIS.

Sometimes when a user uploads a group of students or enters students' information incorrectly, it is required to delete the records. You can do so by going to the student list view, selecting one or more students, clicking on the three-dotted menu in the upper right corner, and choosing Delete Selected.



The following are the cases when the student record can be deleted:

1. Students were imported via data import template or added manually and needed to be deleted - select all the incorrect students and delete them from the triple dot menu on the upper right of the grid.
2. Deletion after scheduling - if students were scheduled into one or more courses but no attendance or grades were given, the go to **Main menu >> Scheduling >> Group Delete**. Choose the course sections and delete the students' schedules. You will then be able to delete the students from the grid.
3. If students have billing or discipline-related transactions, deletion will not be permitted.
4. If an applicant is made a student via the application form, that student cannot be deleted.

# Disable A Student Turn Off Portal Access

## Disable a Student - Turn off Portal Access

Disabling a student in CrownSIS is an important feature that allows school administrators to manage student access to the system. This functionality helps maintain the integrity of the system and ensures that students meet certain requirements for access.

### What Does Disabling a Student Mean?

Disabling a student means restricting their access to the school's online portal and system. A disabled student cannot log in or view their academic information through the system. However, they remain enrolled in the school and can still participate in school activities, be scheduled for courses, and receive communication through other means.

### Grounds for Disabling a Student in CrownSIS

There are several reasons why a student may be disabled in CrownSIS:

1. **Failed Login Attempts:** The system will automatically disable a student if they fail to login successfully more than five times. This is a security measure to protect the student's account from unauthorized access.
2. **Inactivity:** If a student does not log in to the system for 30 consecutive days, the system will disable their account. This helps ensure that only active students maintain access to school resources.
3. **Administrative Decision:** The school administration may choose to disable a student due to disciplinary actions or if there are any outstanding bill payments. This decision is made at the discretion of the school administration based on specific circumstances.

### How to Disable a Student in CrownSIS?

Follow these steps to disable a student in CrownSIS:

1. Access Student Information
2. Go to the **Students** section in CrownSIS
3. Click on **Student Information**

4. Select the **Student**
5. Choose the student you wish to disable from the list
6. Edit **Student Information**
7. Click on **Edit Information** for the selected student



### **Disable the Student**

1. Scroll to the bottom of the page
2. Find the option "**Disable Student** " and click on it
3. Update the Information
4. Click **Update** to save the changes and disable the student



Once disabled, the student will be barred from any portal access but will remain a part of the school community. They can still be scheduled for courses and participate in other school activities as usual.

**Conclusion** Disabling a student is a straightforward process in CrownSIS and serves as an important tool for managing student access. Whether for security, inactivity, or administrative reasons, this feature helps maintain a safe and organized school environment.

# Drop A Student From School

As an administrator can drop a student by navigating through

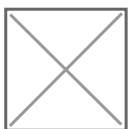
Menu >> Student >> Student Information >> Enrollment Info

You can drop a student from school by going to student information and selecting the student you want to drop or transfer out.

Go to the **Enrollment Info** section under student information. Enter and **Exit Date** and select an **Exit Code**. When the **Transferred Out** code is selected, you will be given an option to select a school within the system to transfer to. If the student is transferring to a school outside the district, then you have to create an **Enrollment Code** as **Transfer Out\*\*\*\*of District**. Go to **Setting >>Students >> Enrollment Codes** to do that.



If you just want to drop the student, then fill out the **Exit Date** and **Exit Code** and click **Update**. The student will be dropped from school and will become inactive.



# Group Assign Student Information

The purpose of group assign student info is to allow you to assign information to a certain group of students (2 or more) where they have common information for certain fields.

Navigate to **Menu >> Student Information >> Group Assign Student Info.**

On the group assignment student info page you can select students from the list of students below who may have similar information. After selecting click **Next**.

After clicking **Next** button you will get to the page where you can add data to several categories as shown below. If you have created custom category, that will show here also. In this example, the Student Locker category was added later. Click on each category and fill out the necessary fields.



Once completed, click on 'Assign Info to Selected Students' to assign data to all the selected students.

# How To Enroll A Student In Multiple Schools With A Home School And Away Schools In CrownSIS

Managing student enrollments across multiple schools can be a complex task, but CrownSIS makes it easier by allowing you to designate one school as the "home school" and others as "away schools." This feature is especially useful for students participating in specialized programs, taking courses at different schools, or for any situation where a student needs to be enrolled in more than one institution. Here's a step-by-step guide on how to enroll a student in multiple schools using CrownSIS.

## Step 1: Access the Student's Profile

To begin the process:

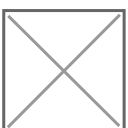
1. Log into CrownSIS with administrative access.
2. Navigate to the "Students" tab from the main dashboard.
3. Search for the student you want to enroll in multiple schools by using their name, student ID, or other identifying details.
4. Click on the student's profile to open their details.



## Step 2: Go to Enrollment Information

Once you are in the student's profile:

1. Locate the "Enrollment Info" section, which you'll find under the student's details.



2. Click on "Edit Information" to access the enrollment settings.

## Step 3: Add Enrollment Info for Additional Schools

In the enrollment section:

1. Scroll to the bottom of the page where you'll see a button labeled "Add Enrollment Info."



2. Click on "Add Enrollment Info." This will open a form where you can enter the enrollment details for an additional school.
3. Fill in the necessary enrollment information for the other school, such as the school name,

grade level, and enrollment date.



## Step 4: Update and Save

After entering the enrollment details:

1. Review the information to ensure accuracy.
2. Click "Update" to save the changes.
3. The initial school where the student was first enrolled will automatically be considered the "home school." The additional schools you enroll the student in will be designated as "away schools."

## Step 5: Verify Enrollment Status

Once the enrollment information is updated:

1. Return to the student's profile and check the "Enrollment Info" section.
2. You should now see the student enrolled in the home school, along with the other schools listed as away schools.
3. Confirm that all the information is correct and that the student is properly enrolled in each school.



# How To Use Search Filters In CrownSIS For Efficient Student And Staff Data Retrievals

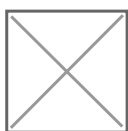
Managing large lists of students in a school setting can be challenging, especially when trying to locate specific records quickly. CrownSIS offers a powerful "Search Filters" feature that allows users to filter any list of students based on customized parameters. This feature not only helps in generating specific lists but also enables users to save these filters for future use. Here's a comprehensive guide on how to use, save, edit, and delete search filters in CrownSIS.

## Using Advanced Search Filters

### Step 1: Access the Advanced Search Option

To start using search filters in CrownSIS:

1. Navigate to any list you wish to filter—this could be a list of students, staff, or any other category available in the system.
2. On the top panel of the list page, you'll find an option labeled "Advanced Search." Click on it to open the advanced search settings.



### Step 2: Set Your Search Parameters

Once in the advanced search section:

1. You'll be presented with various fields where you can enter specific parameters to filter the list. These parameters might include attributes like grade level, access information, enrollment status, staff role, or any other relevant data points.
2. Enter the desired criteria for your search. For example, you could filter students by a specific grade or staff by their role within the school.



## Step 3: Execute the Search

After setting your search parameters:

1. Click on the "Search" button. The system will filter the list based on the criteria you've set and display the results accordingly.
2. Review the filtered list to ensure it meets your requirements.



## Saving a Search Filter

### Step 4: Save the Filter for Future Use

Once you have a filtered list that you may need to reference in the future:

1. Look at the top panel of the filtered list page. You'll see an option labeled "Save Filter".



2. Click on "Save Filter". A prompt will appear asking you to enter a title for the filter. Choose a descriptive name that reflects the parameters you've set, so it's easy to identify later.



3. After naming the filter, click "Save". Your filter will now be saved in the system for future use.

## Loading a Saved Filter

### Step 5: Apply a Previously Saved Filter

When you need to retrieve a filtered list using a saved filter:

1. Go to any relevant list, such as a student or staff list.
2. On the top panel, look for the "Load Filter" option. Click on it.
3. A list of all your saved filters will appear. Select the filter name you want to apply.
4. The list will automatically update based on the parameters saved in the filter, displaying the specific records you need.



# Editing or Deleting a Saved Filter

## Step 6: Manage Your Saved Filters

To modify or remove a saved filter:

1. Click on the filter name you wish to edit or delete.
2. You'll be given two options: "Edit Filter" and "Delete Filter".



### Editing a Filter

- If you select "Edit Filter," the saved parameters will be displayed. You can then adjust these parameters—add new criteria, remove existing ones, or make any other changes.
- After making your adjustments, click "Update" to save the changes to the filter.

### Deleting a Filter

- If you no longer need a particular filter, you can simply click "Delete Filter." This action will permanently remove the filter from the system.

# Re Enroll Students

## Re-enroll Students

As an administrator, you can re-enroll students who are returning back to your school.

Navigate to **Menu >> Students >> Re-enroll Student**

The system will show a list of inactive students that you can select to re-enroll.

Select the students by clicking on the check box and fill out the Re-enrollment Date, Enrollment Code, and Grade Level.



Click on '**Re-enroll Selected Students**' and the students will be re-enrolled in the school.

You can view the student's record and go to the enrollment tab where you will see the new enrollment record has been created.

# Transfer A Student From One School To Another Within CrownSIS

## Step-by-Step Guide to Transferring a Student

### Step 1: Access Student Information

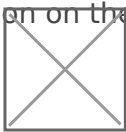
1. **Navigate to Students** : Start by logging into your SIS. From the main dashboard, go to the “Students” section.
2. **Access Student Information** : Within the “Students” section, select “Student Information.” This will bring up a list of all students currently enrolled.
3. **Filter the Student** : Use the available filters to locate the specific student you wish to transfer. You can search by name, student ID, or other criteria provided by the system.



### Step 2: Edit Enrollment Information

1. **Select the Student** : Once you have found the student in the list, click on their name or ID to view their detailed information.
2. **Go to Enrollment Information** : In the student’s profile, look for the “Enrollment Information” option on the left panel. Click on it to view all enrollment records associated

with the student.



3. **Edit Enrollment Information** : At the top right corner of the “Enrollment Information” section, you will see an “Edit Information” button. Click on this button to begin editing the

student’s enrollment details.



### Step 3: Input Transfer Details

1. **Enter Exit Date and Exit Code** : In the “Edit Information” section, you will need to provide the exit date and exit code for the student. The exit date should be the last day the student attended the current school. For the exit code, select “Transferred Out” to indicate that the student is being transferred to another school.



2. **Provide Additional Information** : After entering the exit code, additional fields will appear. These fields will include:

- **Transferred To** : Specify the name of the school to which the student is being transferred.
- **Grade Level** : Indicate the grade level the student will be entering at the new school.
- **Program** : If applicable, select the program the student will be enrolled in at the

new school.



## Step 4: Finalize the Transfer

1. **Update the Record** : After filling in all the necessary information, click on the “Update” button to save the changes.
2. **Confirmation** : The student’s record will now be updated to reflect the transfer, and they will be officially transferred to the new school.

