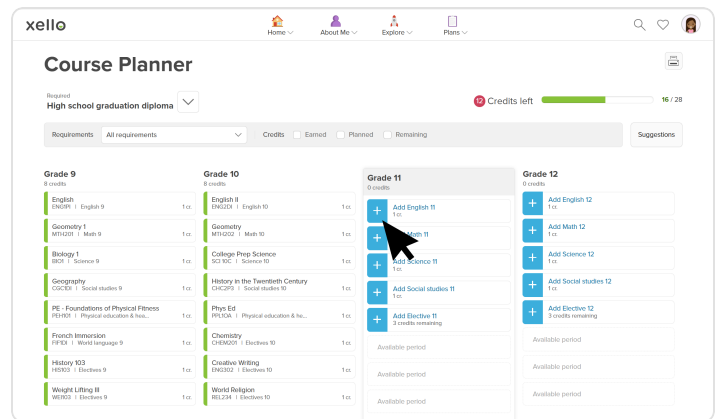


# Path to launching Course Planner

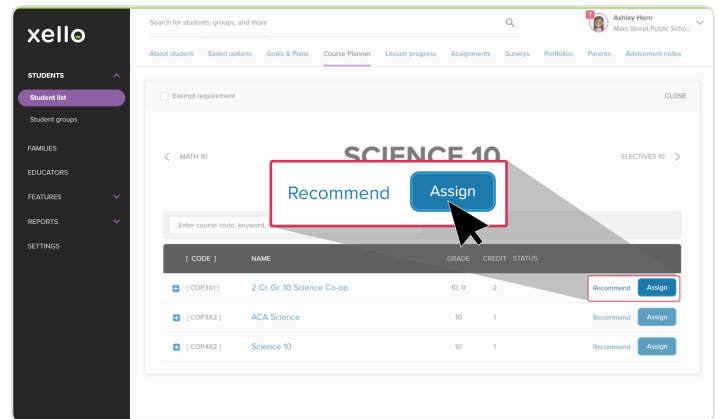
**Course Planner** implementation is fully supported by our team of experts. With regional expertise, they'll ensure your system aligns with graduation requirements, reflects your course catalogue, and works with your Student Information System (SIS).

## About Course Planner

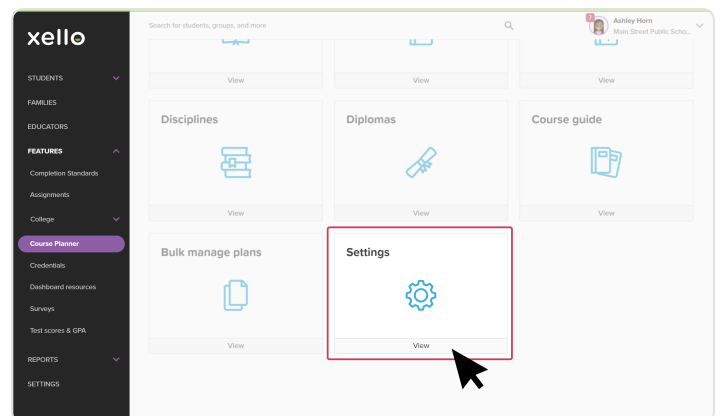
**Students** can use **Course Planner** to select middle school course options and build a 4-year high school course plan, including specialized diploma requirements, that reflects their goals and future plans. It features prerequisite checks, graduation tracking, and more!



**Educators** can provide personalized support by approving plans, assigning courses, applying exemptions, and optimizing selections to keep students on track.



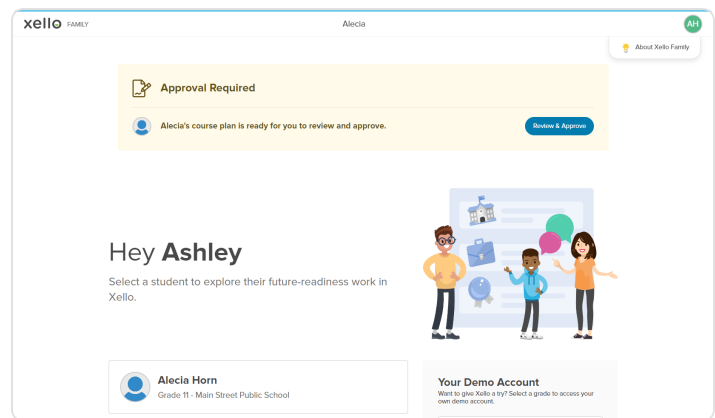
**Xello Administrators** maintain full oversight of the academic pathways by configuring courses, disciplines, and specialized diploma tracks to match district requirements.



## Why use Course Planner

**Course Planner** makes it easy for your district to stay organized while giving students more control. It's built to match your specific rules so that everyone stays on track with less effort.

- **Customized to your district or schools:** Tailored to your graduation requirements (including CTE courses, pathways, and multiple diploma tracks).
- **Self-guided student experience:** Xello's course planner is user-friendly and because it's customized to your requirements, your students can complete and submit their course selections with little-to-no intervention.
- **Parent approval:** If **Xello Family** accounts are enabled, parents can digitally sign off on completed course plans.
- **Export course plans:** Submitted course plans can be exported from Xello and (depending on your SIS) be imported into your SIS for help with future schedule creation.



## Key benefits for educators



### Built-in accountability

Monitor 4-year plan progress and parent approvals by assigning **Course Planner** tasks through **Completion Standards** so they appear as items in the student to-do lists.



### Educator tools and overrides

Counsellors and staff are able to exempt students from certain requirements, bulk manage course plans, approve special requests, and submit incomplete plans if necessary.



### Reporting and tracking

Use real-time reports to monitor plan completion, course demand, and critical alerts, while exporting course plans electronically or as PDFs for parent signatures.

## Course Planner configuration and rollout

**Course Planner** typically takes 2-4 months from start to finish to fully set up. You'll work with your Xello Course Planner Specialist to customize and launch **Course Planner** with expert support at every stage.

Stage & timeframe	Overview
<p><b>1</b></p> <p><b>Share data files</b></p> <p>1-2 weeks</p>	<p>Gather and share the following with your <b>Course Planner Specialist</b>:</p> <ol style="list-style-type: none"> <li>1. Your <b>Course data</b>. This data gets exported from your Student information System (SIS) and sent to us. Use our <a href="#">data definition support or API articles</a> for help on how to send us your course data.</li> <li>2. Your most recent <b>Course Guide</b> or <b>Catalogue</b>. This should include: <ul style="list-style-type: none"> <li>• Course names and descriptions</li> <li>• Credit values</li> <li>• Grade levels offered</li> <li>• Graduation requirements</li> <li>• Prerequisites</li> </ul> </li> <li>3. The answers to a <b>Questionnaire</b> we'll provide you. Your responses will help us configure <b>Course Planner</b> to reflect your district's course structure, scheduling model, and graduation requirements.</li> </ol> <p><b>*Note</b> for districts using Infinite Campus: the SIS Infinite Campus requires an annual fee of \$500 to generate the course data transfers and imports.</p>
<p><b>2</b></p> <p><b>Data entry</b></p> <p>2-4 weeks</p>	<p>The Xello team will enter all courses, diplomas, and disciplines into Xello based on your course guide.</p>
<p><b>3</b></p> <p><b>7-step setup</b></p> <p>2-4 weeks</p>	<p>Review the data entry to make sure everything is just right! Use the video and guide to follow along:</p> <ul style="list-style-type: none"> <li>• <a href="#">7-Step Setup for Course Planner</a> video</li> <li>• <a href="#">Course Planner: 7-step setup guide for Xello Administrators</a></li> </ul> <p>Book a call with your <b>Course Planner Specialist</b> to ensure everything is displaying and aligning correctly. This step helps confirm that the planner is set up accurately and ready for use.</p>

## Stage & timeframe

## Overview

<p><b>4</b></p> <p><b>Roll out to educators</b></p> <p>1 week</p>	<p>Let your educators know <b>Course Planner</b> is ready! Set them up for success by coordinating training and sharing the below resources which include videos, guides, recorded webinars, and articles all about <b>Course Planner</b>.</p> <ul style="list-style-type: none"> <li>• <a href="#">Course Planner for high school counsellors - Xello Academy</a></li> <li>• <a href="#">Get Started: Course Planner in Xello</a></li> <li>• <a href="#">Course Planner Knowledge Base</a></li> </ul>
<p><b>5</b></p> <p><b>Roll out to students</b></p> <p>1 week</p>	<p>Now that <b>Course Planner</b> is set up and your educators are ready to roll it out, time to get your students planning their courses! Quick resources to share with students include:</p> <ul style="list-style-type: none"> <li>• <a href="#">Planning your courses in Xello</a> - short video</li> <li>• <a href="#">Add your Courses in 5th grade</a> - guide</li> <li>• <a href="#">Course Planner for middle school</a> - guide</li> <li>• <a href="#">Course Planner for high school</a> - guide</li> </ul>
<p><b>6</b></p> <p><b>Ongoing support</b></p> <p>Unlimited</p>	<p>The Xello team will be available to provide ongoing support, answer questions, give guidance, and help ensure you and your team always feel confident using <b>Course Planner</b>.</p>



Ready to start setting up **Course Planner** for your students? Contact your Success Manager to set up a discovery call with a dedicated Course Planner Specialist to review the process with you further.