



Helios v1.0.5 Quick Start User Guide

Program Preparation

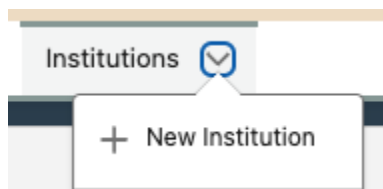
Required permission set: Helios Program Management

Create an Institution

An **Institution** represents any organization, group, school, company, or other entity that needs to be represented in the application. Some common examples:

- An entity that is operating an academic program
- An entity that issues academic credits to students for successfully completing enrollments
- An entity that has issued academic credits to a student, which are transferring to a Helios configured program
- An entity where an instructor works, or in contracting through

Before creating a new program, it is recommended to first create the institution that will be operating the program. To do this, navigate to the Helios Program Manager app, and from the Institutions tab menu, select **New Institution**.



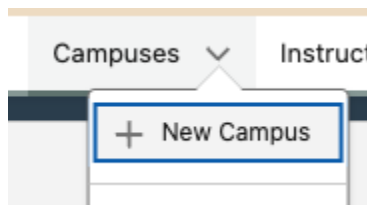
Provide an Institution Name, and optionally the website, phone number, and address information for this institution. When ready, select the **Create Institution** button to generate the Institution record.

Create Campuses

A **Campus** represents a location where academic programs may be delivered. There are two types of campuses supported in Helios:

1. **Physical:** A physical campus represents a location where program delivery takes place in person. This will commonly represent a school or university, but could also represent a nontraditional learning location for vocational studies, or a person's home.
2. **Virtual:** A virtual campus represents a location where program delivery is performed in an online environment. Typically, delivery is done through a Learning Management System (LMS).

To create a new campus record, navigate to the Helios Program Manager app, and from the Campuses tab menu, select **New Campus**.



Provide a campus name and type (physical or virtual). When ready, select the **Save** button to generate the Campus record.

Create Courses

In Helios, a **Course** represents a topic of study that may be delivered through an academic program. Courses can be offered through one or more programs, and delivered across multiple campuses.

To create a new course record, navigate to the Helios Program Manager app, and from the Courses tab menu, select **New Course**. Provide a course name, number, and description. Optionally, for secondary school courses, SCED information may also be included. When ready, select the **Save** button to generate the Course record.

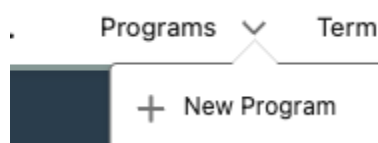
Program Setup

Required permission set: Helios Program Management

Create a Program

An academic program, including all of its terms, courses, classes, requirements, campuses, and instructors, is a core component of the Helios app. Programs are highly configurable, and can be adapted to the nature of the offering, or offerings, provided to students.

To create a new program in Helios, navigate to the Helios Program Manager app, and from the Programs tab menu, select **New Program**.



Creating a Program record includes the following:

- **Program Name:** The desired name of the program.
- **Institution:** The institution running the program, which can be associated to the Institution record created above
- **Student Types:** The student types supported for the program. At this time, used only for informational purposes.
- **Waitlisting Allowed:** Specifies whether registering students can be waitlisted for the program.
- **Active:** Identifies if the program is active. This does not necessarily mean the program is actively in service or registering students.
- **Program Type:** The type of program this record represents. At this time, used only for informational purposes.
- **Tuition Type:** Identifies the model in which tuition is collected (if at all).
- **Default Term Unit:** The default model of how terms are specified for the program. At this time, used only for informational purposes.
- **Allow Transferred Credits:** Identifies if pending, or current, students can transfer credits from outside the program for purposes of contributing toward completion requirements.
- **Program Start Date/Time:** The day and time the program officially begins.
- **Program End Date/Time:** The day and time the program officially ends, if applicable.
- **Registration Period Start Date/Time:** Represents the starting day and time registration into the program is allowed.
- **Registration Period End Date/Time:** Represents the ending day and time registration into the program is allowed.

Assign Courses

After a program is set up, the courses that will be offered through the program can now be assigned. To do so, select the **Assign Course** button from the Program record's highlight bar. When assigning a course to a program, specify the following:

- **Program Course Name:** The name of the course, as it will be offered through the program. For example, *High School Algebra I* when an *Algebra I* course is being offered through a high school program.
- **Course:** Lookup to the Course record that will be assigned to the Program. (See [Create Courses](#))
- **Program Course Number:** A program number, code, or ID that identifies this course within the program.
- **Credit Issuing Entity:** If academic credit is to be offered for the course, the institution that will be issuing the credit for successful completion of the course. By default, this will be the institution assigned to the program. (See [Create an Institution](#))
- **Default Number of Credits:** If academic credit is to be offered for the course, the default number of credits issued by any related classes.

When finished, selecting **Save** will create a new **Program Course** record, representing the offering of a course through a program. Repeat the above process to assign additional courses to the program. Additionally, Helios allows for applying multiple assignments of a course to a program. (For example, when offering multiple variations of the same course.)

Assign Campuses

One or more campuses can also be assigned to a program, identifying the "locations" the program's classes will be delivered. Programs can also include a combination of physical and virtual campus assignments. To assign a campus, select the **Assign Campus** button from the Program record's highlight bar. When assigning a campus to a program, specify the following:

- **Campus:** Lookup to the Campus record that will be assigned to the Program. (See [Create Campuses](#))
- **Availability Start Date/Time:** The date the campus will first be available for the program.
- **Availability End Date/Time:** The date the campus will no longer be available for the program.

When finished, selecting **Save** will create a new **Program Campus** record, representing the assignment of a campus to a program. Repeat the above process to assign additional campuses to the program.

Specify Program Registration Requirements

Registration requirements define the minimum requirements for acceptance into an academic program. This ensures that registrars can properly track applicants and make appropriate decisions within the program registration workflow. To include a registration requirement for a program, select the **Add Registration Requirement** button from the Program record's highlight bar. When including a registration requirement, specify the following:

- **Requirement Type:** The type of registration requirement to include for the program. The representation of the **Minimum** and **Maximum** values are also dictated by the chosen requirement type.

Requirement Type	Description	Minimum Value	Maximum Value
Immunization	An immunization record is needed for program acceptance.	Not Used	Not Used
Age	Only students within an acceptable age range are accepted in the program.	The minimum student age.	The maximum student age.
Grade Level	Only students within an acceptable grade level range are accepted in the program.	The minimum student grade level.	The maximum student grade level.
Residency	The student must live in a particular area, or region, to be eligible for acceptance.	Not Used	Not Used
Student Education Plan	A student education plan needs to be provided for program acceptance.	Not Used	Not Used
Other	A requirement that is not identified by one of the other requirement types.	Based on type	Based on type

- **Requirement Enforcement:** The level of enforcement for the requirement. This is subjective, and is used to advise and inform the registrars processing program registrations.
 - **Required:** The requirement *must* be met for acceptance into the program.
 - **Recommended:** The requirement is *preferred* to be met for acceptance into the program, but is not fully required.
 - **Optional:** The requirement is *desired* to be met, but does not significantly influence acceptance.
- **Document Requirement:** Identifies if, and how necessary, documentation supporting the requirement should be provided.
 - **Required:** One or more of the accepted documents *must* be submitted to meet the registration requirement.
 - **Recommended:** Document submission of one or more accepted documents is *preferred* to meet the registration requirement.

- **Optional:** Document submission of one or more accepted documents is *desired* to meet the registration requirement, but is not fully necessary.
- **Not Required:** No document submission is necessary.
- **Acceptable Documents:** The document(s) that may be submitted to meet the document requirement for the registration requirement.
- **Description:** Information about the requirement, including additional detail when the **Requirement Type** is set to *Other*.

When finished, selecting **Save** will create a new **Program Registration Requirement** record for the program. This requirement will now be applied to any future program registrations. Repeat the above process to assign additional registration requirements to the program.

Specify Program Completion Requirements

Completion requirements define the minimum requirements for a student to successfully complete an academic program. Program administrators can track student progress within a program by comparing achievements defined on the student's academic record with these requirements. To include a completion requirement for a program, select the **Add Completion Requirement** button from the Program record's highlight bar. When including a completion requirement, specify the following:

- **Requirement Type:** The type of completion requirement to include for the program. The representation of the **Minimum Value**, **Category Type**, and **Category Value** values are also dictated by the chosen requirement type.

Requirement Type	Description	Minimum Value	Category Type	Category Value
Total GPA	The grade point average earned by the student in the program.	GPA value	Not Used	Not Used
Total Credits	The total number of credits earned by the student in the program.	Number of credits	Not Used	Not Used
Categorized Earned Credits	The total number of credits earned by a student in a specific subject area or grade level.	Number of credits	Subject Area or Grade Level	Subject Area (not used for grade level)

- **Description:** Information about the requirement, including additional detail when the **Category Type** is set to *Grade Level*.

When finished, selecting **Save** will create a new **Program Completion Requirement** record for the program. This requirement will now be applied to any new program participations. Repeat the above process to assign additional completion requirements to the program

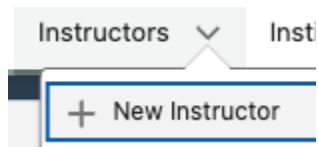
Instructor Information

Required permission set: Helios Program Management

Create an Instructor

An instructor is an individual responsible for the delivery of a class or learning session, or otherwise performs pedagogical activities. Helios provides the flexibility to associate instructors to multiple classes, and with differing roles.

To create a new instructor in Helios, navigate to the Program Manager app, and from the Instructors tab menu, select **New Instructor**.



Creating an Instructor record includes the following:

- **First Name:** The instructor's first name
- **Last Name:** The instructor's last name
- **Suffix:** Optionally, a suffix to apply to the instructor's name
- **Title:** The instructor's title
- **Instructor:** The institution that the instructor belongs to. Note that this can be different from the institution responsible for operating a program that the instructor may be assigned.
- **Business Phone Number:** The instructor's business phone number
- **Mobile Phone Number:** The instructor's mobile phone number
- **Email Address:** The instructor's email address (typically, a work email)

When finished, selecting **Create Instructor** will generate a new **Instructor** record for the individual. Repeat the above process to create additional instructors. Instructors that may be assigned across multiple Helios programs *do not* require separate records.

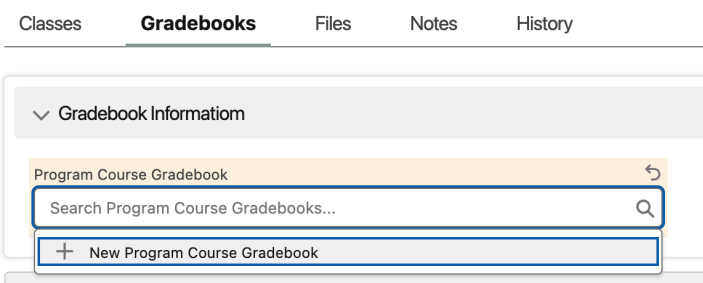
Program Course Gradebook Setup

Required permission set: Helios Program Management

Create a Program Course Gradebook

In Helios, the Program Course Gradebook defines all of the default assessments and grading methodologies applied to a program course. This serves two key purposes: 1) Standardizing the assessments for all classes that are associated to a program course, and 2) Provides a *template* of assessments for a class gradebook that can be further modified at the class level.

To create a new program course gradebook, first navigate to the Program Course record in the Helios Program Manager app. Choose the **Gradebooks** tab, and from the Program Course Gradebook field, inline edit and choose **New Program Course Gradebook**.



Creating a Program Course Gradebook record includes the following:

- **Program Course Gradebook Name:** The desired name of the gradebook record.
- **Default Final Grade Method:** The grading method used by default for applying the final grade. If desired, this can be modified within the class gradebooks.

Grading Method	Description	Example
Letter Grade (A-F)	Traditional letter grading model	A, A-, C+, F
Numeric Score	Total points scoring system	80, 123, 245
Percentage	Relative scoring based on a percentage out of 100	92%, 65.3%
Pass/Fail	Binary final assessment based on outcomes	Pass, Fail
Complete/Incomplete	Binary final assessment based on class completeness	Complete, Incomplete
Not Graded	No final assessment is applied	N/A

- **Active:** Identifies if the program course gradebook is active, and can be applied to the program course.

When finished, selecting **Save** will create a new **Program Course Gradebook** record, then selecting **Save** again will assign it to the Program Course record. Repeat the above process to generate gradebook records for other program courses.

Create Program Course Gradebook Assessments

Program Course Gradebook Assessments represent the default individual assessments, or assignments, that make up the program course gradebook. Collectively, these assessments make up the *syllabus* for the program course, outlining the activities that a student must perform for classes associated with the program course.

The components of a Program Course Gradebook Assessment record includes the following:

- **Program Course Gradebook Assessment Name:** The name, or topic, to apply to the assessment.
- **Description:** A longer form description of the assessment
- **Program Course Gradebook:** Lookup to the **Program Course Gradebook** record for which this assessment belongs.
- **Assessment Requirement:** The enforcement type to apply to the assessment toward class completion (for those classes related to the program course):
 - **Required:** This assessment contributes to the student's final grade, and *must* be completed by the student toward class completion.
 - **Recommended:** This assessment does not contribute to the student's final grade, but is considered toward class completion.
 - **Optional:** The assessment does not contribute to the student's final grade, and is not considered toward class completion.
 - **Extra Credit:** The assessment contributes to the student's final grade, but is not considered toward class completion.

- **Grading Method:** The grading method to apply for this assessment.

Grading Method	Description	Example
Letter Grade (A-F)	Traditional letter grading model	A, A-, C+, F
Numeric Score	Total points scoring system	80, 123, 245
Percentage	Relative scoring based on a percentage out of 100	92%, 65.3%
Pass/Fail	Binary assessment based on outcomes	Pass, Fail
Complete/Incomplete	Binary assessment based on class completeness	Complete, Incomplete
Not Graded	No assessment grading is applied	N/A

- **Order:** The relative chronological order of this assessment among all other assessments assigned to the gradebook
- **Active:** When selected, this assessment is actively in use, and will contribute to newly generated class gradebooks mapped to the related program course.

Note that for any new **Class** records generated for the program course, a new **Class Gradebook** record will also be generated, along with **Class Gradebook Assessment** records for all active program course gradebook assessments.

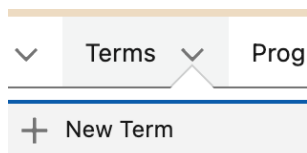
Terms and Classes

Required permission set: Helios Program Management

Create a Term

Programs are divided into one or more terms, representing a segment of time where classes are held, and learning activity takes place. For example, a school may have an academic year divided into two terms: a fall semester, and a spring semester. Alternatively, there may be a perpetual term that exists throughout the duration of a program. This is a model common in virtual and professional learning scenarios.

To create a new term in Helios, navigate to the Helios Program Manager app, and from the Terms tab menu, select **New Term**. (Alternatively, a new term can be added to a program by viewing the respective Program record, then selecting **Add Term** in the highlight bar)



Creating a new Term record includes the following:

- **Term Name:** The desired name of the term (e.g. Fall 2024)
- **Status:** Typically set to **Inactive** initially, then made **Active** after the Term has been fully configured.
- **Program:** The program for which this term belongs. Terms may only be assigned to one program at a time.
- **Term Unit:** The type of program segment represented by this term. For informational purposes only at this time.
- **Maximum Student Participations:** If applicable, the maximum number of term participations allowed for this term. For informational purposes only at this time.
- **Minimum Number of Credits:** If applicable, the minimum number of academic credits required for a student's term participation. For informational purposes only at this time.
- **Maximum Number of Credits:** If applicable, the maximum number of academic credits allowable for a student's term participation. For informational purposes only at this time.
- **Minimum Enrollments Per Student:** If applicable, the minimum number of enrollments required for a student's term participation. For informational purposes only at this time.
- **Maximum Enrollments Per Student:** If applicable, the maximum number of enrollments allowable for a student's term participation. For informational purposes only at this time.
- **Term Start Date/Time:** The *official* start date and time when learning activity commences for the term.

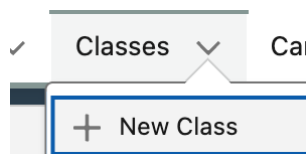
- **Term End Date/Time:** The *official* end date and time when learning activity ceases for the term. This can be left blank for a perpetual term.
- **Registration Period Start Date/Time:** The date and time where term registration into the program can begin.
- **Registration Period End Date/Time:** The date and time where term registration into the program is no longer available.
- **Default Enrollment Start Date/Time:** The default start date and time to apply for any new enrollments associated with this term. This is useful for scenarios where students typically begin a term participation at the same time.
- **Default Enrollment End Date/Time:** The default end date and time to apply for any new enrollments associated with this term. This is useful for scenarios where students typically end a term participation at the same time.

When finished, selecting **Save** will create a new **Term** record, and associate it with the defined program. Repeat the above process to create additional terms for a program.

Create a Class

In Helios, a class represents the delivery of a program course within an academic term. With this model, multiple classes for the same program course can be in session simultaneously, with different instructors, locations, and students, term configurations, and gradebooks.

To create a new class in Helios, navigate to the Helios Program Manager app, and from the Classes tab menu, select **New Class**. (Alternatively, a new class can be added to a term by viewing the respective Term record, then selecting **Add Class** in the highlight bar)



Creating a new Term record includes the following:

- **Class Name:** The desired name of the class (e.g. Biology 101)
- **Status:** Typically set to **Pending** initially. See below for the default workflow.
- **Program Course:** The program course that this class will be delivering. Classes may only be assigned to one program course at a time. This means that a program course delivered in two parts must itself be maintained as two distinct records.
- **Credits Issued:** The number of credits to be issued upon successful completion of this class.

- **Term:** The term in which this class will be offered. Classes may only be assigned to one term at a time. This means that a class delivered across multiple terms must be configured as multiple classes.
- **Maximum Class Size:** If applicable, the maximum number of active enrollments allowed for the class at any given time.
- **Class Start Date/Time:** The *official* start date and time when learning activity commences for the class. This value cannot be prior to the **Term Start Date/Time** value for the associated term.
- **Class End Date/Time:** The *official* end date and time when learning activity ceases for the class. This can be left blank for a perpetual class. Additionally, this value cannot be later than the **Term End Date/Time** value for the associated term.
- **Enrollment Acceptance Start Date/Time:** The date and time where accepted enrollments can begin for the class. This value cannot be prior to the **Class Start Date/Time** of the class.
- **Enrollment Acceptance End Date/Time:** The final date and time where accepted enrollments for a class must end. This value cannot be prior to the **Class End Date/Time** for the class.
- **Drop Period Start Date/Time:** The default start date and time a class is allowed to be dropped by a student with an active enrollment. For informational purposes only at this time.
- **Drop Period End Date/Time:** The default end date and time a class is allowed to be dropped by a student with an active enrollment. For informational purposes only at this time.

When finished, selecting **Save** will create a new **Class** record, and associate it with the defined term, and program course. Repeat the above process to create additional classes for a program. Additionally, if there is a **Program Course Gradebook** assigned to the related program course, a new **Class Gradebook** is generated with the same properties, along with new **Class Gradebook Assessment** records, mapped to all active **Program Course Gradebook Assessment** records found in the program course gradebook. (See [Create Program Course Gradebook Assessments](#))

The default workflow for classes in Helios is as follows:

- **Pending:** Represents a class that either needs approval, or is otherwise not ready to make available. This can be considered a *draft* status.
- **Approved:** A class has been reviewed, and is approved to begin accepting enrollments.
- **In Session:** The class has begun, as defined by the **Class Start Date/Time**. Student enrollments are active.
- **Ended:** The class has ended, as defined by the **Class End Date/Time**. There should no longer be any active student enrollments.
- **Closed:** All post-completion activities related to the class have completed (final grading, credit issuance, instructor offboarding, etc.) and no further action remains for this class.

Assign Instructors

In many cases, one or more instructors will be responsible for the delivery of a class, and those assignments can be managed within Helios. To assign an instructor to a class, select the **Assign Instructor** button from the Term record's highlight bar. When assigning an instructor to a class, specify the following:

- **Instructor:** The instructor that will be assigned to the class. (See [Create an Instructor](#)). Note that instructor assignments are not restricted to the institution that is operating the class' program.
- **Role:** The role this instructor will serve in the class. Multiple instructors can serve the same role within a class.
- **Primary:** When selected, identifies that this is the class' primary instructor. For informational purposes only at this time.
- **Active:** When selected, identifies that this instructor is currently actively involved with the class delivery.

When finished, selecting **Save** will create a new **Instructor Assignment** record, representing the association of the instructor with the class. Repeat the above process to assign additional instructors to the class.

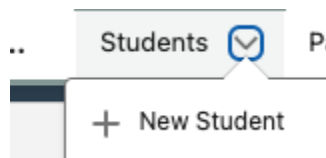
Student Information

Required permission set: Helios Student Management

Create a Student

Like a program, the representation of students, along with related enrollments, registrations, participations, and academic credits, constitutes a core component of the Helios app. And because students can span across multiple programs, Helios provides a complete, and singular, non-disparate, academic view of the student.

To create a new student in Helios, navigate to the Helios Student Manager app, and from the Students tab menu, select **New Student**.



Creating a Student record includes the following:

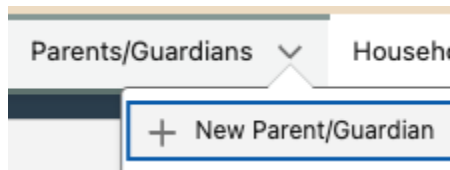
- **First Name:** The student's first name
- **Middle Name:** Optionally, the student's middle name
- **Last Name:** The student's last name
- **Suffix:** Optionally, a suffix to apply to the student's name
- **Birth Date:** The student's date of birth, if applicable
- **Household:** A household representing the family group that the student belongs to. Depending on the type of student, or programs managed within Helios, this may not be applicable.
- **Home Phone:** The home phone number of the student, or of a parent/guardian that is responsible for the student.
- **Mobile Phone:** The mobile phone number of the student, or of a parent/guardian that is responsible for the student.
- **Email Address:** The student's email address.
- **Home Address:** The student's home address, or of a parent/guardian that is responsible for the student.

When finished, selecting **Create Student** will generate a new **Student** record for the individual. Repeat the above process to create additional students.

Create a Parent/Guardian

For some academic programs, particularly those in K-12 education, it is also important to track parent/guardian information for registering, and participating, students.

To create a new parent/guardian in Helios, navigate to the Helios Student Manager app, and from the Parents/Guardians tab menu, select **New Parent/Guardian**.



Creating a Parent/Guardian record includes the following:

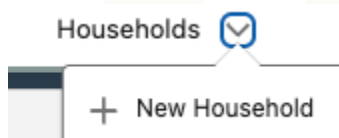
- **First Name:** The parent/guardian's first name
- **Last Name:** The parent/guardian's last name
- **Suffix:** Optionally, a suffix to apply to the parent/guardian's name
- **Household:** A household representing the family group that the parent/guardian belongs to. Depending on the type of student, or programs managed within Helios, this may not be applicable.
- **Home Phone:** The home phone number of the parent/guardian
- **Mobile Phone:** The mobile phone number of the parent/guardian
- **Email Address:** The parent/guardian's email address.
- **Address:** The parent/guardian's home address.

When finished, selecting **Create Parent/Guardian** will generate a new **Parent/Guardian** record for the individual. Repeat the above process to create additional parents/guardians.

Create a Household

Where applicable, associating students and parents/guardians to the same household can help track familial units, or other appropriate groupings.

To create a new household in Helios, navigate to the Helios Student Manager app, and from the Households tab menu, select **New Household**.



Creating a Household record includes the following:

- **Household Name:** The name of the household to apply
- **Physical Address:** The physical address where the household resides
- **Mailing Address:** The address for mail should be delivered for the household, if different from the Physical Address. *(Made available by toggling the **Is the mailing address different?** option.)*

When finished, selecting **Create Household** will generate a new **Household** record. Student and Parent/Guardian records can be associated to a Household record by modifying the respective record.



Student Registration, Participation and Enrollment

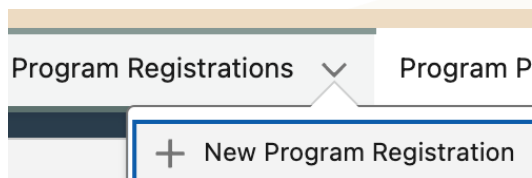
Required permission set: Helios Enrollment Management

Create a Program Registration

A program registration represents the workflow for a student to become registered, or accepted into an active Helios academic program. The key activities performed during the program registration process include:

- Confirming the prospective student meets the program registration requirements
- Collecting all necessary documentation for acceptance into the program
- Initiating the transfer of academic credits from another program
- In parallel, processing the initial term registration for the student in the program
- Waitlisting students if program has reached capacity, or to accept students in advance

To create a new program registration in Helios, navigate to the Helios Enrollment Manager app, and from the Program Registrations tab menu, select **New Program Registration**.



Creation of a new Program Registration record includes the following:

- **Status:** The status of the new Program Registration record. This will typically begin in **Pending Review** or **Under Review** status.
- **Program:** The program that the student will be registering in. The program must be active, and within the record creation date should fall within the defined registration period. (See [Create a Program](#))
- **Initial Term:** The first term that the student will register in upon acceptance into the program.
- **Transferring Credits?:** Identifies if the student will be transferring academic credits as part of the registration process. For now, this is only for informational purposes.
- **Applied Grade Level:** Where applicable, the grade level for which the student will begin the program, upon acceptance.
- **Student:** The student that will be registering within the program. (See [Create a Student](#))
- **Parent/Guardian:** Where applicable, the parent/guardian that will serve as point of contact related to the program registration.

When finished, selecting **Save** will create a new **Program Registration** record, initiating the registration workflow. Repeat the above process to create additional program registrations.

The default workflow for program registrations in Helios is as follows:

- **Pending Review:** Represents a program registration that is new, and where no ownership has been accepted, and no activity has been performed.
- **Under Review:** Ownership of the program registration has been accepted, and is actively working through the registration process.
- **Waitlisted:** The registration is considered waitlisted, or programs that support waitlisting. This may be due to program student capacity, or availability of an active term.
- **Declined:** The prospective student is not accepted into the program. This typically means that program requirements were unmet, or the registration was incomplete.
- **Registered:** The prospective student has been accepted into the program, and no further registration activities are needed.

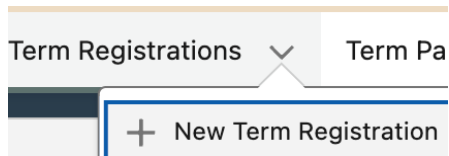
When a program registration is set to **Registered** status, the following actions automatically execute:

- A new **Program Participation** record is created for the student, representing the student's program completion workflow.
- A new **Term Registration** record is created for the student, based on the initial term specified. This represents the workflow for enrolling the student in classes, and applying any tuition payments.
- If one does not already exist, a new **Academic Record** record is created for the student.
- If applicable, any pending transferred academic credits are added to the academic record as issued **Academic Credit** records.

Processing a Term Registration

When a student is registered into a new program, a new **Term Registration** record is automatically created. This workflow represents the process of setting up one or more enrollments for the student, and where applicable, applying tuition payment information. A lookup to the newly created Term Registration record can be found on the Program Registration record (in the **Initial Term Registration** field), when the Program Registration is in **Registered** status.

Alternatively, to create a new term registration in Helios, navigate to the Helios Enrollment Manager app, and from the Term Registrations tab menu, select **New Term Registration**.



Creation of the new Term Registration record includes the following:

- **Student:** The student that will be registering within the term. (See [Create a Student](#))
- **Term:** The term that the student will be registering for. (See [Create a Term](#))

In Helios, term registrations are also generated any time a program participating student needs to enroll in additional classes for a new program term, *or* within a participating term. This means that enrollment processing can be staggered throughout a term, which is particularly relevant for programs with perpetual terms. For either scenario, a new Term Registration record can also be created from the **Add Term Registration** button on any active Program Participation record.

The default workflow for program registrations in Helios is as follows:

- **Pending:** Represents a term registration that is new, and where no ownership has been accepted, and no activity has been performed.
- **Course Selection:** Courses are currently in the selection process for the student.
- **Tuition Payment:** For programs where tuition is collected, represents that tuition collection is in process. The default workflow assumes that tuition is paid prior to assigning (enrolling) students in classes.
- **Class Enrollment:** The student is currently being enrolled in a class for each course selected in the tuition registration.
- **Canceled:** The term registration has been canceled, and no further activity is needed. Students are not enrolled in any selected classes.
- **Accepted:** The term registration has been processed, and the student is now enrolled in chosen classes.

If one does not already exist for the student in the term, when a term registration is set to **Accepted** status, a new **Term Participation** record is created. This represents the student's term completion workflow.

Enroll Student in a Class

Enrollments refer to the placing of a student within a class for education delivery. The flexibility of Helios allows for enrollment processing to adapt to a wide range of delivery models. For example, in open enrollment models, all students in a class are not required to begin and end on the same date and time.

Class enrollments are processed during term registrations, and can be initiated by selecting the **Enroll Student** button from a **Term Registration** record. When enrolling a student, the following information is gathered:

- **Class:** The class in which to enroll the student. It must be in **Approved** or **In Session** status, and the current date and time within the configured enrollment acceptance period for a valid enrollment.
- **Start Date/Time:** The date and time for the enrollment to begin. This date and time cannot be in the past, and must be within the class's configured session period.
- **End Date/Time:** The date and time for the enrollment to end. The date and time cannot be in the past, must be later than the start date and time, and prior to the class's end date.

When a new enrollment is processed, a new **Enrollment Gradebook** and related **Enrollment Gradebook Assessments** are generated for the student, mirroring the gradebook configured for the class.

The default workflow for enrollments in Helios is as follows:

- **Pending:** Represents an enrollment that is assigned to the student, but requires approval (such as through the term registration process)
- **Approved:** An enrollment that has been approved for the student. If no approval is necessary, new Enrollment records may begin in this status.
- **Active:** The enrollment is in progress, based on the specified start date and time.
- **On Hold:** If necessary, the enrollment may be placed on hold to indicate that no activity is taking place. However, the enrollment itself is not canceled, dropped, ended, etc.
- **Incomplete:** The enrollment has ended (reached the end date/time) but all required assessments have not been completed.
- **Dropped:** The enrollment has been dropped by the student within the class's specified drop period, annulling the enrollment.
- **Completed:** The enrollment has been completed by the student, and if applicable, academic credit issued.

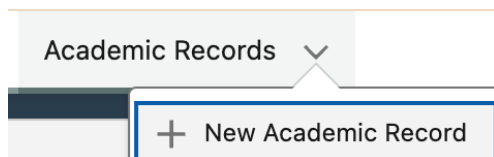
Academic Record and Credits

Required permission set: Helios Enrollment Management / Helios Student Management

Academic Records

A student's academic record encompasses all academic credits related to a student - issued, pending, and declined. This includes all credits earned through completion of Helios based enrollments, or transferred from other non-Helios programs.

An **Academic Record** record is automatically created when a student is first registered within a Helios academic program. (See [Create a Program Registration](#)) If needed, a new record may also be created by navigating to the Helios Enrollment Manager app, and from the Academic Records tab, select, **New Academic Term**. After populating the **Student** field with the **Student** record the new academic record will apply to, selecting **Save** will generate the new record.



Issuing Academic Credits

Credits may be added for a student's academic record by selecting the **Add Academic Credit** button in the desired Academic Record record's highlight bar. When manually adding academic credits, specify the following:

- **Status:** The status of the new credit.
 - **Pending:** A credit that has not yet been earned, nor is in the process of being earned (via an enrollment). Transferred credits during program registration also start in this status until issued after acceptance.
 - **In Progress:** A credit that is in the process of being earned, such as through a class enrollment.
 - **Issued:** A credit that has been issued to the student. Where applicable, the credit is formally applied to the related program's completion requirement.
 - **Denied:** A credit that was in the process of being earned, but was subsequently not issued. (For example, from a failed grade in a class enrollment).
- **Program:** Where applicable, the program for which the credit should be applied. This will contribute to the program's completion requirements.
- **Credit Amount:** The number of credits to issue for the record.

- **Program Completion Requirement:** Where applicable, the Program Completion Requirement to apply the credit.
- **Issuing Entity:** The institution that will be issuing the credit. This may be different than the institution operating the program from which the credit was (will be) earned.
- **Program Registration Transfer:** Where applicable, the program registration where the transferred credit originated.
- **Issuance Date:** If issued, the date that the credit was issued. This will default to the current date.

Once finished, selecting **Save** will add the credit to the academic record.

When class enrollments are completed, and if configured to issue credit, new **Academic Credit** records will be automatically created for the related student.

