

What is an AD HOC Membership?

An Ad Hoc Membership is a user-defined group of students that can be created and processed as a single group for many reports and filtering/searching purposes. Ad Hoc Memberships are not the same as Student Memberships (many of which are pre-defined through the State of Ohio), and Ad Hoc Memberships can only be used or viewed by the user who created them, unless the user un-checks "Make Private".

Some example uses of Ad Hoc Memberships:

- Run reports for that specific group of students
- Bulk Update that specific groups student profile (Student Profile Bulk Update)

How to create an Ad Hoc Membership

Bread Crumb Trail: My Account – Ad Hoc Membership

1. Click on Add New Ad Hoc Membership 
2. Type name of the Membership. Decide if you want to make the membership Private or Active

Membership Name: Active: Make Private:

3. Choose your Search Mode of *Search Criteria* or *Student IDs*. Select criteria based on the student general information. Multiple criteria maybe selected at one time.
4. **Students Selected by Default:** If this checkbox is selected, all students in the search results list will initially be selected for inclusion in the new Membership. If this checkbox is not selected, students in the list will not be initially selected.

Click **Search**

[Hide Search]

Search Mode: Search Criteria Student IDs Use Existing Memberships

General Info | Additional Info | Miscellaneous Info | Course Section Info | Assessment Info

Last Name: Middle Name:

First Name: Called Name:

Social Security: Birthdate: 

Ethnicity: Gender:

Street: City:

State: Zip Code:

Students Selected by Default

201 Records Displayed

Date: 10/10/14

Add to Membership Replace Membership

5. Click Add Selected Students button.
Add to Membership: Will add the selected students to the Ad Hoc Membership without removing any students currently assigned to Ad Hoc Membership
Replace Membership: Will add the selected students to the Ad Hoc Membership in place of any students already in the Ad Hoc Memberships

6. Your screen will refresh with total number of students added and will list the student records

Added 13 Students to Membership

7. ******Scroll down to the bottom and click SAVE.** *****