

Back to School Checklist – Items that need to be verified before the 1st day of school.

(Can be completed in any order.)

Tasks	Completed	Initials
Student:		
Enroll new students in 21/22. <i>(FY22 Admission and Withdrawal Scenarios)</i> <i>StudentInformation » SIS » Registration Wizard</i>	<input type="checkbox"/>	
Enter contact information for newly registered students. <i>StudentInformation » SIS » Student » Contacts Summary</i>	<input type="checkbox"/>	
Update profiles of existing students. <i>StudentInformation » SIS » Student » Edit Profile</i>	<input type="checkbox"/>	
Update contact information for existing students. <i>StudentInformation » SIS » Student » Contacts Summary</i>	<input type="checkbox"/>	
Use registration wizard or student transfer to enroll students in 21/22 that were missed by promotion. <i>(FY22 Admission and Withdrawal Scenarios)</i> <i>StudentInformation » SIS » Registration Wizard or StudentInformation » SIS » Student » Student Transfer</i>	<input type="checkbox"/>	
Process students who have withdrawn over the summer. <i>(FY22 Admission and Withdrawal Scenarios)</i> <i>StudentInformation » SIS » Student » Withdraw Student</i>	<input type="checkbox"/>	
Ensure all Resident Attending Elsewhere students are assigned to the non-attending calendar. (Hint: Use Advance Search to search for R status students and flip thru them to ensure they are assigned to the non-attending calendar.) <i>StudentInformation » SIS » Student » Edit Profile</i>	<input type="checkbox"/>	
Assign lockers, if applicable. <i>(Assigning Lockers Procedural Checklist)</i> <i>StudentInformation » Management » Ad-Hoc Updates » Locker Bulk Assignment</i>	<input type="checkbox"/>	
Assign homerooms, if applicable. <i>(Homeroom Assignment Procedural Checklist)</i> <i>StudentInformation » Management » Ad-Hoc Updates » Homeroom Bulk Assignment</i>	<input type="checkbox"/>	
Assign counselors, if applicable. <i>(Assigning Counselors Procedural Checklist)</i> <i>StudentInformation » Management » Ad-Hoc Updates » Counselor Bulk Assignment</i>	<input type="checkbox"/>	
Reassign Family Group Couriers <i>(Family Groups and Contacts Procedural Checklist)</i> <i>StudentInformation » Management » District Administration » Family Groups Wizard</i>	<input type="checkbox"/>	
Attendance: <i>(Attendance Procedural Checklist)</i>		
Configure StudentInformation Options – Attendance tab for either period or daily attendance. <i>StudentInformation » Management » School Administration » StudentInformation Options</i>	<input type="checkbox"/>	
Verify attendance codes are set up properly in Attendance Maintenance. <i>StudentInformation » Management » School Administration » Attendance Administration</i>	<input type="checkbox"/>	
Staff/Security:		
Make any needed changes to staff and staff job functions on View Staff Members page. <i>StudentInformation » Management » Security » View Staff Members</i>	<input type="checkbox"/>	
Add impersonations to applicable staff on the View Accounts page. Impersonations allow non-teachers to view students in the Teacher Menu. <i>StudentInformation » Management » Security » View Accounts</i>	<input type="checkbox"/>	

Scheduling:		
Update EMIS fields on courses. <i>(Course Course Section Course Group Setup Procedural Checklist or StudentInformation EMIS End User Documentation)</i> <u>StudentInformation » Management » School Administration » Scheduling Administration » Course Maintenance » Courses</u>	<input type="checkbox"/>	
Continue processing schedule changes for existing students and add schedules for new students who were not enrolled at the time scheduling initially took place. <i>(Elementary Scheduling Procedural Checklist or Batch Scheduler Procedural Checklist)</i> <u>StudentInformation » SIS » Student » Student Schedule » Request Assignments or StudentInformation » SIS » Scheduling » Course Section Assignments</u>	<input type="checkbox"/>	
Verify course section assignments have the correct start date. <u>StudentInformation » SIS » Student » Student Schedule » Request Assignments or StudentInformation » SIS » Scheduling » Course Section Assignments</u>	<input type="checkbox"/>	
Finalize the 21/22 schedule in StudentInformation Options – Scheduling tab. <u>StudentInformation » Management » School Administration » StudentInformation Options</u>	<input type="checkbox"/>	
Print Class Lists (R703). The R703 lists each student assigned to a specific class. <i>(Report Card Processing Procedural Checklist)</i> <u>StudentInformation » SIS » Marks » Marks Reports » Class List Formatter (R703)</u>	<input type="checkbox"/>	
Print Schedules (R701) <i>(Batch Scheduler Procedural Checklist)</i> <u>StudentInformation » SIS » Scheduling » Scheduling Reports » Schedule Card Formatter (R701)</u>	<input type="checkbox"/>	
Fees: optional <i>(Fee Procedural Checklist)</i>		
Verify proration tables are set up and linked to fees. <u>StudentInformation » Management » School Administration » Fees Administration » Prorated Fee Schedules</u>	<input type="checkbox"/>	
Verify and update course fees, membership fees, general fees, and miscellaneous fees. <u>StudentInformation » Management » School Administration » Fees Administration</u>	<input type="checkbox"/>	
Make sure Uses Fees and Has Fees Assigned are checked on StudentInformation Options – Fees tab. <u>StudentInformation » Management » School Administration » StudentInformation Options</u>	<input type="checkbox"/>	
Bulk Assign fees. <u>StudentInformation » Management » Ad-Hoc Updates » Student Fee Assignment</u>	<input type="checkbox"/>	
Marks:		
Define whether the building is using Alpha or Numeric marks on StudentInformation Options – Marks tab. <i>(School Year Initialization Procedural Checklist or Report Card Processing Procedural Checklist)</i> <u>StudentInformation » Management » School Administration » StudentInformation Options</u>	<input type="checkbox"/>	
School Building:		
Verify course terms are correct and linked to the proper schedule terms. <i>(School Year Initialization Procedural Checklist or Report Card Processing Procedural Checklist)</i> <u>StudentInformation » Management » School Administration » Scheduling Administration » Initialization » Course Terms</u>	<input type="checkbox"/>	
Verify each reporting term has the correct start and stop date. <i>(School Year Initialization Procedural Checklist or Report Card Processing Procedural Checklist)</i> <u>StudentInformation » Management » School Administration » Scheduling Administration » Initialization » Reporting Terms Maintenance</u>	<input type="checkbox"/>	
Verify the school’s master calendar is correct. Pay close attention to the start and stop dates and planned and actual day counts. <i>(Calendar Non-EMIS or Master and Sub-Calendar Maintenance including EMIS Exceptions Procedural Checklist)</i> <u>StudentInformation » Management » School Administration » Scheduling Administration » Master Calendar</u>	<input type="checkbox"/>	
Verify Sub-calendars are set up correctly. <i>(Calendar Non-EMIS or Master and Sub-Calendar Maintenance including EMIS Exceptions Procedural Checklist)</i> <u>StudentInformation » Management » School Administration » Scheduling Administration » Sub-Calendars</u>	<input type="checkbox"/>	
Update building information such as Principal name on School Demographics page.	<input type="checkbox"/>	

<u>StudentInformation</u> » <u>Management</u> » <u>School Administration</u> » <u>School Building Administration</u> » <u>School Demographics</u>		
Review and update Progress Book On flag on School Demographics page for all buildings and district.	<input type="checkbox"/>	
<u>StudentInformation</u> » <u>Management</u> » <u>School Administration</u> » <u>School Building Administration</u> » <u>School Demographics</u>		
Set up registration defaults.	<input type="checkbox"/>	
<u>StudentInformation</u> » <u>Management</u> » <u>School Administration</u> » <u>School Building Administration</u> » <u>Registration Defaults</u>		