



MyEducationBC

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# District & School Start-up Tasks Checklist

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August, 2018 v1.5

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## Version History

Version	Date	Description
1.0	July 17, 2015	Initial document created
1.1	May 4, 2016	Removed Transportation section
1.2	Aug 23, 2016	Review and revisions
1.3	Aug 24, 2016	Removed transcript column attributes, removed prepare grade input, minor edits
1.4	Aug 14, 2017	Added step to set and save grade term cover maps; Added Active Date Set By preference;
1.5	Aug 17, 2018	Updated relevant document names

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## 1.0 District Tasks

	Task	Path	Description	Relevant Document(s) for Detail
<input type="checkbox"/>	Review district details	<ul style="list-style-type: none"> <li>District view &gt; District top tab &gt; Preferences leaf &gt; Category = General</li> </ul>	<ul style="list-style-type: none"> <li>May want to check the box for the new address searching functionality "Limit to organization"</li> </ul>	<ul style="list-style-type: none"> <li>District Setup</li> </ul>
<input type="checkbox"/>	Initialize district calendar	<ul style="list-style-type: none"> <li>District view &gt; District top tab &gt; School Years side tab.</li> </ul>	<ul style="list-style-type: none"> <li>Initialize calendar for the current school year</li> </ul>	<ul style="list-style-type: none"> <li>District Setup</li> </ul>
<input type="checkbox"/>	Validate Staff Records	<ul style="list-style-type: none"> <li>District view &gt; Staff top tab.</li> </ul>	<ul style="list-style-type: none"> <li>Update as necessary.</li> </ul>	<ul style="list-style-type: none"> <li>Security Management</li> </ul>
<input type="checkbox"/>	Review User Accounts	<ul style="list-style-type: none"> <li>District view &gt; Admin top tab.</li> </ul>	<ul style="list-style-type: none"> <li>Update as necessary.</li> </ul>	<ul style="list-style-type: none"> <li>Security Management</li> </ul>
<input type="checkbox"/>	Review District Preferences	<ul style="list-style-type: none"> <li>District view &gt; District top tab &gt; Preferences leaf.</li> </ul>	<ul style="list-style-type: none"> <li>Category = Schedule.</li> <li>Review course mask setting.</li> <li>Review fields shared to schools.</li> </ul>	<ul style="list-style-type: none"> <li>District Setup</li> </ul>

	Task	Path	Description	Relevant Document(s) for Detail
<input type="checkbox"/>	Review District Course Catalogue	<ul style="list-style-type: none"> <li>District view &gt; Schedule top tab &gt; Courses side tab.</li> </ul>	<ul style="list-style-type: none"> <li>Add/remove courses as necessary.</li> <li>Review course attributes.</li> <li>Set ATT-AM and ATT-PM courses to `Hide from grade input` and `Hide on report card`.</li> </ul>	<ul style="list-style-type: none"> <li>District Setup</li> </ul>

## 2.0 School Tasks

	Task	Path	Description	Relevant Document(s) for Detail
<input type="checkbox"/>	Review Attendance Settings	<ul style="list-style-type: none"> <li>School view &gt; School top tab &gt; Setup side tab &gt; Preferences leaf</li> </ul>	<ul style="list-style-type: none"> <li>Category = Daily Attendance</li> <li>Category = Class Attendance</li> <li>Category = Secondary School Management</li> </ul>	<ul style="list-style-type: none"> <li>School Setup</li> <li>Class Attendance Management</li> <li>Daily Attendance Management</li> </ul>
<input type="checkbox"/>	Review Schedule settings	<ul style="list-style-type: none"> <li>School view &gt; School top tab &gt; Setup side tab &gt; Preferences leaf</li> </ul>	<ul style="list-style-type: none"> <li>Category = Schedule</li> </ul>	<ul style="list-style-type: none"> <li>School Setup</li> </ul>
<input type="checkbox"/>	Continuous Entry schools confirm <i>Active Date Enabled By</i> setting	<ul style="list-style-type: none"> <li>School view &gt; School top tab &gt; Setup side tab &gt; Preferences leaf</li> </ul>	<ul style="list-style-type: none"> <li>Category = Grade</li> </ul>	<ul style="list-style-type: none"> <li>DL and CE School Setup and Processes</li> </ul>
<input type="checkbox"/>	Commit schedule in build view	<ul style="list-style-type: none"> <li>Build View</li> </ul>	<ul style="list-style-type: none"> <li>Choose Scenario to be used as the master schedule for the year.</li> <li>Review Master Schedule in School view (Section details)</li> </ul>	<ul style="list-style-type: none"> <li>School Setup</li> </ul>

	Task	Path	Description	Relevant Document(s) for Detail
<input type="checkbox"/>	Set active schedule	<ul style="list-style-type: none"> <li>School View &gt; School top tab &gt; Schedules side tab.</li> </ul> <p>If a schedule was committed from the Build view, this will be in place.</p> <p>If creating schedules manually, an active schedule will need to be created.</p>	<ul style="list-style-type: none"> <li>Is the schedule Active?</li> <li>Do the dates cover the entire school calendar?</li> </ul>	<ul style="list-style-type: none"> <li>School Setup</li> </ul>
<input type="checkbox"/>	Set up grade terms	<ul style="list-style-type: none"> <li>School view &gt; Grades top tab &gt; Grade Terms side tab.</li> </ul>	<ul style="list-style-type: none"> <li>Does the number of grade terms match the transcript definitions applied to courses?</li> <li>Are the grade term dates inside the active schedule dates?</li> </ul>	<ul style="list-style-type: none"> <li>School Setup</li> <li>Grade Management</li> </ul>
<input type="checkbox"/>	Set Grade Term Cover Maps	<ul style="list-style-type: none"> <li>School view &gt; Schedule top tab &gt; Structure side tab &gt; Terms</li> </ul>	<ul style="list-style-type: none"> <li>Set appropriate grade term cover map boxes for all schedule terms</li> </ul> <p><b>NOTE:</b> You must SAVE each schedule term even if no adjustments are made</p>	<ul style="list-style-type: none"> <li>School Setup</li> <li>Grade Management</li> </ul>

	Task	Path	Description	Relevant Document(s) for Detail
<input type="checkbox"/>	Review Course Catalogue	<ul style="list-style-type: none"> <li>School view &gt; Schedule top tab &gt; Courses side tab.</li> </ul>	<ul style="list-style-type: none"> <li>Course attributes               <ul style="list-style-type: none"> <li>Transcript Definitions.</li> <li>Rubric Definitions</li> <li>Attributes in the Report Card Field Set.</li> <li>Set ATT-AM and ATT-PM courses to “Hide from grade input” and “Hide on report card.”</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>School Setup</li> </ul>
<input type="checkbox"/>	Review Structure	<ul style="list-style-type: none"> <li>School view &gt; Schedule top tab &gt; Structure side tab.</li> </ul>	<ul style="list-style-type: none"> <li>Terms               <ul style="list-style-type: none"> <li>Do all terms have dates?</li> <li>Are all term dates inside the active schedule dates?</li> <li>Are grade term cover maps set for all schedule terms?</li> </ul> </li> <li>Days               <ul style="list-style-type: none"> <li>Are all days represented?</li> </ul> </li> <li>Periods               <ul style="list-style-type: none"> <li>Are all periods in place and consecutive?</li> </ul> </li> <li>Bell Schedules               <ul style="list-style-type: none"> <li>Are all necessary bell schedules created?</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>School Setup</li> </ul>
<input type="checkbox"/>	Review student schedules	<ul style="list-style-type: none"> <li>Student top tab &gt; Schedule side tab</li> </ul>	<ul style="list-style-type: none"> <li>Check matrix view to ensure it is populated and student courses are displayed correctly in the grid.</li> </ul>	<ul style="list-style-type: none"> <li>Student Scheduling</li> </ul>



	Task	Path	Description	Relevant Document(s) for Detail
<input type="checkbox"/>	Review school calendar	<ul style="list-style-type: none"> <li>School view &gt; School top tab &gt; Calendars side tab.</li> </ul>	<ul style="list-style-type: none"> <li>Adjust non-session dates as necessary.</li> <li>Assign Day numbers to each in-session date as appropriate.</li> <li>Assign Bell Schedules to each in-session date as appropriate</li> </ul>	<ul style="list-style-type: none"> <li>School Setup</li> </ul>
<input type="checkbox"/>	Review school locker table	<ul style="list-style-type: none"> <li>School view &gt; Lockers side tab.</li> </ul>	<ul style="list-style-type: none"> <li>Add/remove/modify locker information as necessary.</li> </ul>	<ul style="list-style-type: none"> <li>School Setup</li> </ul>
<input type="checkbox"/>	Review student locker assignments	<ul style="list-style-type: none"> <li>School view &gt; Student top tab.</li> </ul>	<ul style="list-style-type: none"> <li>Add/remove/modify locker information as necessary.</li> </ul>	<ul style="list-style-type: none"> <li>Enrollment and Demographics</li> </ul>
<input type="checkbox"/>	Review fee assignments	<ul style="list-style-type: none"> <li>School view &gt; School top tab &gt; Cashier's Office side tab &gt; Fees sub-side tab.</li> </ul>	<ul style="list-style-type: none"> <li>Delete or void any outstanding fees for students who have left your school.</li> </ul>	<ul style="list-style-type: none"> <li>Fees Management</li> </ul>

	Task	Path	Description	Relevant Document(s) for Detail
<input type="checkbox"/>	Review student information	<ul style="list-style-type: none"> <li>School view &gt; Student top tab</li> </ul>	<ul style="list-style-type: none"> <li>Are there any students with Pre-Reg or status other than Active that need changing?</li> <li>Assign calendars to all students.</li> <li>Update homerooms as necessary.</li> <li>Do students YOGs match their grades?</li> <li>Review students with grade sub-levels of HS, SU, EU, etc. Is this still appropriate?</li> <li>Update family courier information as necessary.</li> <li>Update Diploma Types.</li> <li>Update Diploma Granted Date for students who completed courses over the summer to fulfill grad requirements.</li> </ul>	<ul style="list-style-type: none"> <li>Enrollment and Demographics</li> </ul>
<input type="checkbox"/>	Students with secondary school associations	<ul style="list-style-type: none"> <li>School view &gt; Student top tab</li> </ul>	<ul style="list-style-type: none"> <li>Do all secondary students have their attendance management type set appropriately?</li> </ul>	<ul style="list-style-type: none"> <li>Enrollment and Demographics</li> </ul>
<input type="checkbox"/>	Validate Staff Records	<ul style="list-style-type: none"> <li>School view &gt; Staff top tab.</li> </ul>	<ul style="list-style-type: none"> <li>Update staff details as necessary.</li> <li>Update staff homeroom assignments as necessary.</li> <li>Update staff school associations as appropriate.</li> </ul>	<ul style="list-style-type: none"> <li>Security Management</li> </ul>