# District & School Start-up Tasks Checklist

Aug 2024 V1.9

## Version History

| Version | Date | Description |
|---------|------|-------------|
| 1.0 | Jul 2015 | Initial document created |
| 1.1 | May 2016 | Removed Transportation section |
| 1.2 | Aug 2016 | Review and revisions |
| 1.3 | Aug 2016 | Removed transcript column attributes, removed prepare grade input, minor edits |
| 1.4 | Aug 2017 | Added step to set and save grade term cover maps; Added Active Date Set By preference; |
| 1.5 | Aug 2018 | Updated relevant document names |
| 1.6 | Apr 2019 | Added hyperlinks to Table of Contents |
| 1.7 | Aug 2020 | 6.1 Upgrade |
| 1.8 | Aug 2023 | 6.3 & 6.6 Upgrades |
| 1.9 | Aug 2024 | 6.7 Upgrades and add DOLS Information |

## Confidentiality

**Table of Contents**

## 1.0   District Tasks

| | Task | Path | Description | Relevant Document(s) for Detail |
|---|---|---|---|---|
| ☐ | Review district details | • District view > District top tab > Preferences leaf > Category = General | • May want to check the box for the new address searching functionality "Limit to organization" | • District Setup |
| ☐ | Initialize district calendar | • District view > District top tab > School Years side tab. | • Initialize calendar for the current school year<br>• This should be done after the EOYR process | • District Setup |
| ☐ | Validate Staff Records | • District view > Staff top tab. | • Update as necessary<br>• Update staff secondary school associations as appropriate. | • Security Management |
| ☐ | Review User Accounts | • District view > Admin top tab. | • Update as necessary. | • Security Management |

| | Task | Path | Description | Relevant Document(s) for Detail |
|---|---|---|---|---|
| ☐ | Review District Preferences | • District view > District top tab > Preferences leaf. | • Category = Schedule.<br>• Review course mask setting.<br>• Review fields shared to schools. | • District Setup |
| ☐ | Review District Course Catalogue | • District view > Schedule top tab > Courses side tab. | • Add/remove courses as necessary.<br>• Review course attributes.<br>• Set ATT-AM and ATT-PM courses to `Hide from grade input` and `Hide on report card`. | • District Setup |

## 2.0 School Tasks

| | Task | Path | Description | Relevant Document(s) for Detail |
|---|---|---|---|---|
| ☐ | Review School settings | • School view > School top tab > Setup side tab > Details leaf | • Template = All Fields<br>• Check school's email is a monitored email address and is correct. | • School Setup |
| ☐ | Review Attendance Settings | • School view > School top tab > Setup side tab > Preferences leaf | • Category = Daily Attendance<br>• Category = Class Attendance<br>• Category = Secondary School Management | • School Setup<br>• Class Attendance Management<br>• Daily Attendance Management |
| ☐ | Review Schedule settings | • School view > School top tab > Setup side tab > Preferences leaf | • Category = Schedule | • School Setup |
| ☐ | Continuous Entry schools confirm *Active Date Enabled By* setting | • School view > School top tab > Setup side tab > Preferences leaf | • Category = Grade | • DL and CE School Setup and Processes |
| ☐ | Commit schedule in build view | • Build View | • Choose Scenario to be used as the master schedule for the year.<br>• Review Master Schedule in School view (Section details) | • School Setup |

| | Task | Path | Description | Relevant Document(s) for Detail |
|---|---|---|---|---|
| ☐ | Set active schedule | • School View > School top tab > Schedules side tab.<br><br>If a schedule was committed from the Build view, this will be in place.<br><br>If creating schedules manually, an active schedule will need to be created. | • Is the schedule Active?<br>• Do the dates cover the entire school calendar? | • School Setup |
| ☐ | Set up grade terms | • School view > Grades top tab > Grade Terms side tab. | • Does the number of grade terms match the transcript definitions applied to courses?<br>• Are the grade term dates inside the active schedule dates?<br>• Make sure grade terms do not overlap. | • School Setup<br>• Grade Management |
| ☐ | Set Grade Term Cover Maps | • School view > Schedule top tab > Structure side tab > Terms | • Set appropriate grade term cover map boxes for all schedule terms<br><br>**NOTE:** You must SAVE each schedule term even if no adjustments are made | • School Setup<br>• Grade Management |

| | Task | Path | Description | Relevant Document(s) for Detail |
|---|---|---|---|---|
| ☐ | Review Course Catalogue | • School view > Schedule top tab > Courses side tab. | • Course attributes<br>  o Transcript Definitions.<br>  o Rubric Definitions<br>  o Attributes in the Report Card Field Set.<br>  o Set ATT-AM and ATT-PM courses to "Hide from grade input" and "Hide on report card. | • School Setup |
| ☐ | Review Structure | • School view > Schedule top tab > Structure side tab. | • Terms<br>  o Do all terms have dates?<br>  o Are all term dates inside the active schedule dates?<br>  o Are grade term cover maps set for all schedule terms?<br>• Days<br>  o Are all days represented?<br>• Periods<br>  o Are all periods in place and consecutive?<br>• Bell Schedules<br>  o Are all necessary bell schedules created? | • School Setup |
| ☐ | Review student schedules | • Student top tab > Schedule side tab | • Check matrix view to ensure it is populated and student courses are displayed correctly in the grid. | • Student Scheduling |

| | Task | Path | Description | Relevant Document(s) for Detail |
|---|---|---|---|---|
| ☐ | Review school calendar | • School view > School top tab > Calendars side tab. | • Adjust non-session dates as necessary.<br>• Assign Day numbers to each in-session date as appropriate.<br>• Assign Bell Schedules to each in-session date as appropriate | • School Setup |
| ☐ | Review school locker table | • School view > Lockers side tab. | • Add/remove/modify locker information as necessary. | • School Setup |
| ☐ | Review student locker assignments | • School view > Student top tab. | • Add/remove/modify locker information as necessary. | • Enrollment and Demographics |
| ☐ | Review fee assignments | • School view > School top tab > Cashier's Office side tab > Fees sub-side tab. | • Delete or void any outstanding fees for students who have left your school. | • Fees Management |
| ☐ | Validate Staff Records | • School view > Staff top tab. | • Update staff details as necessary.<br>• Update staff homeroom assignments as necessary.<br>• Update staff school associations as appropriate. | • Security Management |

| | Task | Path | Description | Relevant Document(s) for Detail |
|---|---|---|---|---|
| ☐ | Review student information | • School view > Student top tab | • Are there any students with Pre-Reg or status other than Active that need changing?<br>• Assign calendars to all students.<br>• Update homerooms as necessary.<br>• Do students YOGs match their grades?<br>• Review students with grade sub-levels of HS, SU, EU, etc. Is this still appropriate?<br>• Update family courier information as necessary.<br>• Assign/Review Graduation Diploma Types.<br>• Update Diploma Granted Date for students who completed courses over the summer to fulfill grad requirements. | • Enrollment and Demographics |
| ☐ | Students with secondary school associations | • School view > Student top tab | • Do all secondary students have their attendance management type set appropriately? | • Enrollment and Demographics |
| ☐ | DOLS Schools | • School view > Student top tab > Filter = DOLS Student Outside Catchment > Field Set = DOLS Outside of District Postal Code | • Review the list of students identified in the filter to ensure validity of registration.<br>• | • DL & CE Schools Setup and Processes<br>• Enrollment & Demographics |