



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

(Can be completed in any order.)

Task	Completed	Initials
Student:		
Enroll new students in 18/19. <i>(18/19 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 18/19 that were missed by promotion. <i>(18/19 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Process students who have withdrawn over the summer.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>(18/19 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 to Student Procedural Checklist)</i> <i>StudentInformation » Management » Ad-Hoc Updates » Locker Bulk Assignment</i>	<input type="checkbox"/>	
Assign homerooms, if applicable. <i>(Homeroom Step by Step Checklist)</i> <i>StudentInformation » Management » Ad-Hoc Updates » Homeroom Bulk Assignment</i>	<input type="checkbox"/>	
Assign counselors, if applicable. <i>(Assigning Counselors to Students Procedural Checklist)</i> <i>StudentInformation » Management » Ad-Hoc Updates » Counselor Bulk Assignment</i>	<input type="checkbox"/>	
Reassign Family Group Couriers <i>(Family Group & Contacts Step by Step Checklist)</i> <i>StudentInformation » Management » District Administration » Family Groups Wizard</i>	<input type="checkbox"/>	
Attendance:		
Configure StudentInformation Options – Attendance tab for either period or daily attendance. <i>(Attendance Procedural Checklist)</i> <i>StudentInformation » Management » School Administration » StudentInformation Options</i>	<input type="checkbox"/>	
Verify attendance codes are set up properly in Attendance Maintenance. <i>(Attendance Procedural Checklist)</i> <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>(Security Procedural Checklist)</i> <i>StudentInformation » Management » Security » View Staff Members</i>	<input type="checkbox"/>	
Add impersonations to applicable staff on the View Users page. Impersonations allow non-teachers to view students in the Teacher Menu. <i>(Security Procedural Checklist)</i> <i>StudentInformation » Management » Security » View Users</i>	<input type="checkbox"/>	

Scheduling:		
Update EMIS fields on courses. <i>(Course and Course Section Setup Course Group and Course Group Section Setup Procedural Checklist or StudentInformation EMIS End User Documentation)</i> StudentInformation » Management » School Administration » Scheduling Administration » Course Maintenance » Courses	<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 Running the Batch Scheduler Procedural Checklist)</i> StudentInformation » SIS » Student » Student Schedule » Request Assignments or StudentInformation » SIS » Scheduling » Course Section Assignments	<input type="checkbox"/>	
Verify course section assignments have the correct start date. StudentInformation » SIS » Student » Student Schedule » Request Assignments or StudentInformation » SIS » Scheduling » Course Section Assignments	<input type="checkbox"/>	
Finalize the 18/19 schedule in StudentInformation Options – Scheduling tab. StudentInformation » Management » School Administration » StudentInformation Options	<input type="checkbox"/>	
Print Class Lists (R703). The R703 lists each student assigned to a specific class. <i>(Report Card Processing Procedural Checklist)</i> StudentInformation » SIS » Marks » Marks Reports » Class List Formatter (R703)	<input type="checkbox"/>	
Print Schedules (R701) <i>(Running the Batch Scheduler Procedural Checklist)</i> StudentInformation » SIS » Scheduling » Scheduling Reports » Schedule Card Formatter (R701)	<input type="checkbox"/>	
Fees: optional		
Verify proration tables are set up and linked to fees. <i>(Fee Accounting Procedural Checklist)</i> StudentInformation » Management » School Administration » Fees Administration » Prorated Fee Schedules	<input type="checkbox"/>	
Verify and update course fees, membership fees, general fees, and miscellaneous fees. <i>(Fee Accounting Procedural Checklist)</i> StudentInformation » Management » School Administration » Fees Administration	<input type="checkbox"/>	
Make sure Uses Fees and Has Fees Assigned are checked in StudentInformation Options – Fees tab. <i>(Fee Accounting Procedural Checklist)</i> StudentInformation » Management » School Administration » StudentInformation Options	<input type="checkbox"/>	
Bulk Assign fees. <i>(Fee Accounting Procedural Checklist)</i> StudentInformation » Management » Ad-Hoc Updates » Student Fee Assignment	<input type="checkbox"/>	
Marks:		
Define whether the building is using Alpha or Numeric marks in StudentInformation Options – Marks tab. <i>(School Year Initialization Step by Step or Report Card Processing Procedural Checklist)</i> StudentInformation » Management » School Administration » StudentInformation Options	<input type="checkbox"/>	
School Building:		
Verify course terms are correct and linked to the proper schedule terms. <i>(School Year Initialization Step by Step Checklist or Report Card Processing Procedural Checklist)</i> StudentInformation » Management » School Administration » Scheduling Administration » Initialization » Course Terms	<input type="checkbox"/>	
Verify each reporting term has the correct start and stop date. <i>(School Year Initialization Step by Step Checklist or Report Card Processing Procedural Checklist)</i> StudentInformation » Management » School Administration » Scheduling Administration » Initialization » Reporting Terms Maintenance	<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 Calendar with EMIS Exceptions Procedural Checklist)</i> StudentInformation » Management » School Administration » Scheduling Administration » Master Calendar	<input type="checkbox"/>	
Verify Sub-calendars are set up correctly. <i>(Calendar NON EMIS or Calendar with EMIS Exceptions Procedural Checklist)</i> StudentInformation » Management » School Administration » Scheduling Administration » Sub-Calendars	<input type="checkbox"/>	

Update building information such as Principal name on School Demographics page. <i>StudentInformation » Management » School Administration » School Building Administration » School Demographics</i>	<input type="checkbox"/>	
Review and update Progress Book On flag on School Demographics page for all buildings and district. <i>StudentInformation » Management » School Administration » School Building Administration » School Demographics</i>	<input type="checkbox"/>	
Set up registration defaults. <i>StudentInformation » Management » School Administration » School Building Administration » Registration Defaults</i>	<input type="checkbox"/>	