



MyEducationBC

District & School New Year Start-up Checklist

July, 2015 v1.0

Version History

| Version | Date | Description |
|---------|---------------|--------------------------|
| 1.0 | July 17, 2015 | Initial document created |
| | | |

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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"> District view > District top tab > Preferences leaf > Category = General | <ul style="list-style-type: none"> May want to check the box for the new address searching functionality "Limit to organization" | <ul style="list-style-type: none"> District Setup |
| <input type="checkbox"/> | Initialize district calendar | <ul style="list-style-type: none"> District view > District top tab > School Years side tab. | <ul style="list-style-type: none"> Initialize calendar for 2015-2016. | <ul style="list-style-type: none"> District Setup |
| <input type="checkbox"/> | Validate Staff Records | <ul style="list-style-type: none"> District view > Staff top tab. | <ul style="list-style-type: none"> Update as necessary. | <ul style="list-style-type: none"> Security Management |
| <input type="checkbox"/> | Review User Accounts | <ul style="list-style-type: none"> District view > Admin top tab. | <ul style="list-style-type: none"> Accounts that were disabled were set to Disabled and locked with the 5.3 upgrade. Update as necessary. | <ul style="list-style-type: none"> Security Management |
| <input type="checkbox"/> | Review District Preferences | <ul style="list-style-type: none"> District view > District top tab > Preferences leaf. | <ul style="list-style-type: none"> Category = Schedule. Review course mask setting. Review fields shared to schools. | <ul style="list-style-type: none"> District Setup |
| <input type="checkbox"/> | Review Bus Driver, Bus Group and Buses reference tables (if managed at the District level) | <ul style="list-style-type: none"> District view > Admin top tab > Data Dictionary side tab > Reference sub-side tab | <ul style="list-style-type: none"> Modify as necessary for the new school year. | <ul style="list-style-type: none"> District Setup |

| | Task | Path | Description | Relevant Document(s) for Detail |
|--------------------------|--|--|--|--|
| <input type="checkbox"/> | Review transportation resources (if managed at the District level) | <ul style="list-style-type: none"> School view > School top tab > Membership side tab > Transportation Resources sub-side tab. | <ul style="list-style-type: none"> Update Year ID on resources to the current school year context. Add/remove/modify resources as necessary. | <ul style="list-style-type: none"> District Setup |
| <input type="checkbox"/> | Review transportation (if managed at the District level) | <ul style="list-style-type: none"> School view > School top tab > Membership side tab > Student Transportation sub-side tab. | <ul style="list-style-type: none"> Update School Year Context > Year ID on records to the current school year context. Add/remove/modify records as necessary. | <ul style="list-style-type: none"> District Setup |
| <input type="checkbox"/> | Review District Course Catalogue | <ul style="list-style-type: none"> District view > Schedule top tab > Courses side tab. | <ul style="list-style-type: none"> Add/remove courses as necessary. Review course attributes. Set ATT-AM and ATT-PM courses to `Hide from grade input` and `Hide on report card`. | <ul style="list-style-type: none"> District Setup |
| <input type="checkbox"/> | Review Transcript Column Attributes (optional) | <ul style="list-style-type: none"> District view > Grades top tab > Transcript Column Attributes side tab. | <ul style="list-style-type: none"> If the district has customized final mark calculations or comment lengths. | <ul style="list-style-type: none"> District Setup |

2.0 School Tasks

| | Task | Path | Description | Relevant Document(s) for Detail |
|--------------------------|-------------------------------|--|--|---|
| <input type="checkbox"/> | Review Attendance Settings | <ul style="list-style-type: none"> School view > School top tab > Setup side tab > Preferences leaf | <ul style="list-style-type: none"> Category = Daily Attendance Category = Class Attendance Category = Secondary School Management | <ul style="list-style-type: none"> School Setup or Attendance Management |
| <input type="checkbox"/> | Review Schedule settings | <ul style="list-style-type: none"> School view > School top tab > Setup side tab > Preferences leaf | <ul style="list-style-type: none"> Category = Schedule <p>*New setting for "Allow future add/drop"</p> | <ul style="list-style-type: none"> School Setup |
| <input type="checkbox"/> | Commit schedule in build view | <ul style="list-style-type: none"> Build View | <ul style="list-style-type: none"> Choose Scenario to be used as the master schedule for the year. Review Master Schedule in School view (Section details) | <ul style="list-style-type: none"> School Setup |
| <input type="checkbox"/> | Set active schedule | <ul style="list-style-type: none"> School View > School top tab > Schedules side tab. <p>If a schedule was committed from the Build view, this will be in place.</p> <p>If creating schedules manually (typically elementary or strongstart), an active schedule will need to be created.</p> | <ul style="list-style-type: none"> Is the schedule Active? Do the dates cover the entire school calendar? | <ul style="list-style-type: none"> School Setup |
| <input type="checkbox"/> | Set up grade terms | <ul style="list-style-type: none"> School view > Grades top tab > Grade Terms side tab. | <ul style="list-style-type: none"> Does the number of grade terms match the transcript definitions applied to courses? | <ul style="list-style-type: none"> School Setup or Grade Management |

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

| | Task | Path | Description | Relevant Document(s) for Detail |
|--------------------------|---|--|--|---|
| <input type="checkbox"/> | Review school calendar | <ul style="list-style-type: none"> School view > School top tab > Calendars side tab. | <ul style="list-style-type: none"> Adjust non-session dates as necessary. Assign Day numbers to each in-session date as appropriate. Assign Bell Schedules to each in-session date as appropriate | <ul style="list-style-type: none"> School Setup |
| <input type="checkbox"/> | Review school locker table | <ul style="list-style-type: none"> School view > Lockers side tab. | <ul style="list-style-type: none"> Add/remove/modify locker information as necessary. | <ul style="list-style-type: none"> School Setup |
| <input type="checkbox"/> | Review student locker assignments | <ul style="list-style-type: none"> School view > Student top tab. | <ul style="list-style-type: none"> Add/remove/modify locker information as necessary. | <ul style="list-style-type: none"> Enrollment Management |
| <input type="checkbox"/> | Review Bus Driver, Bus Group and Buses reference tables (if managed at the school level) | <ul style="list-style-type: none"> District view > Admin top tab > Reference sub-side tab | <ul style="list-style-type: none"> Modify as necessary for the new school year. | <ul style="list-style-type: none"> School Setup |
| <input type="checkbox"/> | Review transportation resources (if managed at the school level) | <ul style="list-style-type: none"> School view > School top tab > Membership side tab > Transportation Resources sub-side tab. | <ul style="list-style-type: none"> Update Year ID on resources to the current school year context. Add/remove/modify resources as necessary. | <ul style="list-style-type: none"> School Setup |
| <input type="checkbox"/> | Review transportation | <ul style="list-style-type: none"> School view > School top tab > Membership side tab > Student Transportation sub-side tab. | <ul style="list-style-type: none"> Update School Year Context > Year ID on records to the current school year context. Add/remove/modify records as necessary. | <ul style="list-style-type: none"> School Setup |

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

| | Task | Path | Description | Relevant Document(s) for Detail |
|--------------------------|--|---|---|--|
| <input type="checkbox"/> | Review Transcript Column Attributes (optional) | <ul style="list-style-type: none"> School view > Grades top tab > Transcript Column Attributes side tab. | <ul style="list-style-type: none"> If the school or district has customized calculations or comment lengths. | <ul style="list-style-type: none"> School Setup or Grade Management |
| <input type="checkbox"/> | Prepare grade input | <ul style="list-style-type: none"> School View > Grades top tab > Grade Input side tab. | <ul style="list-style-type: none"> Prepare grade input for terms and course dates as necessary. | <ul style="list-style-type: none"> School Setup or Grade Management |