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# SchoolStart-up Tasks Checklist

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**Secondary Schools  
2023 - 2024**

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Please note admin tasks are highlighted

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TASK	PATH	DESCRIPTION	RELEVANT DOCUMENTS
<b>Verify School Settings</b>	<i>School View &gt; School TT &gt; Setup &gt; Details</i>	<ol style="list-style-type: none"> <li>1. On the <b>General sub-tab</b>, ensure accuracy of the information in the following fields – <b>no change should be required. Do not change any other settings...</b></li> <li>2. Click the <b>Address sub-tab</b> and ensure the school's address information is accurate</li> </ol>	School Setup
<b>Review Attendance Settings</b>	<i>School View &gt; School TT &gt; Setup &gt; Preferences</i>	<ol style="list-style-type: none"> <li>1. Category = Daily Attendance</li> <li>2. Category = Class Attendance</li> <li>3. Category = Secondary School Management</li> </ol>	<ol style="list-style-type: none"> <li>1. School Setup</li> <li>2. Class Attendance Management</li> <li>3. Daily Attendance Management</li> </ol>
<b>Commit the Schedule (Task for VP/Admin)</b>	<i>Build View &gt; Scenario</i>	<ol style="list-style-type: none"> <li>1. Ensure term record has a date range set By clicking <b>Terms ST &gt; Set Dates</b></li> <li>2. Click the record for the current year schedule. <b>Option &gt; Commit Schedule</b></li> <li>3. Review Master Schedule in School View (Section details)</li> </ol>	School Setup
<b>Set Active Schedule (Task for VP/Admin)</b>	<i>School view &gt; School TT&gt; Schedules ST</i>	<ol style="list-style-type: none"> <li>1. If a schedule was committed from the Build View, this will be in place.</li> <li>2. If creating schedules manually, an active schedule will need to be created.</li> <li>3. Select the <b>Filter</b> option and choose <b>ALL RECORDS</b> to determine if a school schedule exists for your school.</li> <li>4. If a schedule record exists, click on the link for the record for the current school year to display the record.</li> <li>5. <b>Click Option &gt; Set Active Schedule</b></li> <li>6. IF no schedule exists for your school: <ol style="list-style-type: none"> <li>a. <b>Click Options &gt; Add.</b></li> <li>b. Populate the <b>Name field</b> with the current schedule name. Example: 2023-2024.</li> <li>c. Use the icon to select a <b>Start Date.</b></li> <li>d. Use the icon to select an <b>End Date.</b></li> <li>e. Click <b>Save.</b></li> <li>f. Click <b>Options &gt; Set Active Schedule.</b></li> </ol> </li> </ol>	School Setup

		7. <i>Check your work: A triangle will appear beside the active schedule</i>	
<b>Verify Bell Schedule</b>	<i>School View &gt; Structure &gt; Bell Schedule</i>	<p>Verify Bell schedule is in place. Bell Schedules can be copied forward from last year by doing the following:</p> <ol style="list-style-type: none"> <li><b>Schedule &gt; Structure &gt; Bell Schedule</b></li> <li><b>Options &gt; Copy From</b></li> <li><b>Choose the School Year and the Active Schedule</b></li> </ol> <p>To Create a new Bell schedule:  <b>Schedule &gt; Structure &gt; Bell Schedules &gt; Options &gt; Add</b></p> <ol style="list-style-type: none"> <li>Type a unique Identifier, Name, and Description for the bell schedule.</li> <li>The 'Include in scheduling?' checkbox, is functionality that will be used by the build engine. During initial setup there are no implications of setting this box either way.</li> <li>For each period, define the Start time and Duration (Minutes).</li> <li>To add an additional period for an after-school program, or another extra period not in the academic schedule, click Add. The Add Bell Period dialog box appears. Define the Bell period number, Period name, Start time and Duration (Minutes), and click OK.</li> <li>Click Save.</li> </ol>	School Setup
<b>Assigning Bell Schedules to Calendar Dates</b>	<i>School View &gt; School TT &gt; Calendars &gt; Dates leaf</i>	<p><b>Option 1: Update multiple records at once.</b></p> <ul style="list-style-type: none"> <li>Select multiple dates for which you want to assign the same bell schedule</li> <li>Click Options in the menu bar, then choose Show Selected. It is important that the screen now displays only the dates to which you wish to assign the same bell schedule.</li> <li>Click Options again.</li> <li>Select Mass Update. The Mass Update popup window will appear.</li> <li>Choose Schedule Bell as the Field value.</li> <li>Use the icon to select the appropriate bell schedule for these dates.</li> <li>Click Update.</li> <li>Acknowledge the confirmations. A</li> </ul>	School Setup




		<p>pop-up window will appear verifying the changes.</p> <ul style="list-style-type: none"> <li>• Click OK</li> <li>• Go to the icon and choose All Records to return to the full list of dates. You will now see the Bell &gt; Name populated for those you mass updated, as well as the dates still to be done.</li> <li>• Repeat the steps above until all dates in your calendar have the appropriate bell schedule assigned.</li> </ul> <p><b>Option 2: Change date individually:</b></p> <ul style="list-style-type: none"> <li>• <b>Click Options &gt; Modify List.</b> Pencils will appear in your column headers.</li> <li>• Click the 'Pencil' icon in the <b>Bell &gt; Name field.</b> Pick list boxes will appear in the column.</li> <li>• Use the '<b>Magnifying Glass</b>' icon to select the appropriate bell schedule for each date.</li> <li>• When finished, <b>click the 'Green Checkmark' icon</b> to save your entries.</li> <li>• <b>Click Options &gt; Modify List</b> to return the list to the normal setting.</li> </ul>	
<b>School Calendar Setup</b>	<i>School View &gt; School TT &gt; Calendars &gt; Details</i>	<p>Once the district calendar has been initialized, schools should see Details. Verify and update the required number of in-session days and School Year Context &gt; Year ID and click Save. Schools need to re-assign schedule days and modify session dates as necessary to reflect school-specific session or non-session dates.</p>	School Setup
<b>Modify School Calendar</b>	<i>School View &gt; School TT &gt; Calendars</i>	<ul style="list-style-type: none"> <li>• Check the box beside the school year calendar you are preparing.</li> <li>• Click the Dates leaf on the Calendars side-tab. School dates should be populated.</li> <li>• Click the blue hyperlink beside the date you need to modify and make the necessary adjustments. <ul style="list-style-type: none"> <li>a. <b>Is school in session:</b> check this box if attendance should be taken on this date. Uncheck this box if attendance will not be taken on this date.</li> <li>b. <b>Schedule day number:</b> type the Schedule day number. Example: if you are on a 2-day schedule, is this date supposed to be Day 1 or Day 2?</li> </ul> </li> </ul>	School Setup


		<p>c. <b>Schedule day type:</b> populate this value from the drop-down menu, only if school is not in session on this date.</p> <p>d. <b>Schedule Bell &gt; Name:</b> If your school uses a bell schedule, click the magnifying glass to select the appropriate bell schedule for this date.</p> <ul style="list-style-type: none"> <li>• Click <b>Save</b>.</li> </ul>	
<b>Review School Structure</b>	<i>School view &gt; Schedule toptab &gt; Structure side tab.</i>	<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 Are all necessary bellschedules created?</li> </ul>	School Setup
<b>Setup Grade Terms (Task for VP/ Admin)</b>	<i>School view &gt; Grades top tab &gt; Grade Terms side tab</i>	<p>Grade terms are attached to schedule terms so must be defined before schedule terms can be set up.</p> <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> <p>To add grade terms:</p> <ul style="list-style-type: none"> <li>• Click Options &gt; Add</li> <li>• Click the 'Magnifying glass' icon on the Term ID field and use the radio button to select the appropriate grade term definition, from the Grade Term Pick List pop-up window.</li> <li>• Use the 'Calendar' icon to select the start and end date of the grade term at your school.</li> <li>• Add grade terms for each of the date's report cards are issued at your school.</li> <li>• Click Save</li> <li>• Repeat steps for each grade term</li> </ul>	<ul style="list-style-type: none"> <li>• School Setup</li> <li>• Grade Management</li> </ul>

		required in the school.	
<b>Setup Grade Term Cover Maps (Task for VP/Admin)</b>	<i>School view &gt; Schedule toptab &gt; Structure side tab &gt; Terms</i>	<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>
<b>Review Course Catalogue</b>	<i>School View &gt; Schedule TT &gt; Courses ST</i>	Filter for current year and review course attributes that impact mark entry: <i>Transcript definition, Rubric Definition, Hide from Grade Input, Hide on Report Card</i>	School Setup
<b>Review Rooms</b>	<i>School View &gt; Schedule &gt; Rooms</i>	Review the rooms	School Setup
<b>Review Schedule settings</b>	<i>School view &gt; School toptab &gt; Setup side tab &gt; Preferences leaf</i>	Category = Schedule	School Setup
<b>Assigning Schedule Days to your Calendar</b>	<i>School View &gt; School TT &gt; Calendars ST</i>	<ul style="list-style-type: none"> <li>Check the box beside the <b>School Year &gt; Year ID</b> you are working with.</li> <li>Select the appropriate calendar and click <b>Dates</b>.</li> <li>On the <b>Options &gt; Reassign Schedule Days</b>.</li> <li>In the <b>Start Date field</b>, use the to select the start date.</li> <li>In the <b>End Date field</b>, use the to select the end date.</li> <li>Select the <b>Initial Schedule Day</b> you want to start with on the start date and <b>click OK</b>.</li> </ul>	School Setup
<b>Review student schedules</b>	<i>School View &gt; Student TT &gt; Schedule ST</i>	Check matrix view to ensure it is populated and student courses are displayed correctly in the grid	Student Scheduling
<b>Verify Student Demographics</b>	<i>School View &gt; Student TT &gt; Details</i>	<ul style="list-style-type: none"> <li>Ensure Demographics are filled in.</li> <li>Ensure every student has Calendar, Citizenship Code, Proof of Age, Home Language, Correct Address, Home Phone number, Correct Contacts</li> <li>Review parent/guardian contact records for all students, especially all incoming grade 8s as well as any new students, to ensure that all appropriate tick boxes are checked. <b>For MyClass Access, legal parent/guardians must have the “Contact has family portal access” box ticked.</b></li> </ul>	Enrollment and Demographics
<b>Verify and update locker</b>	<i>School view &gt; Lockers ST</i>	Add/remove/modify locker information as necessary	School Setup

information			
Review student information	<a href="#">School view &gt; Student toptab</a>	<ul style="list-style-type: none"> <li>• Are there any students with Pre-Reg or status other than Active that need changing?</li> <li>• Ensure calendars are assigned to all students.</li> <li>• Update homeroom as necessary.</li> <li>• Are all students in the appropriate grade? If not, then you will need to change the <b>YOG</b> (Year of Grad) to reflect the appropriate grade If you need to change YOG <ul style="list-style-type: none"> <li>• Student Top Tab &gt; Select the student</li> <li>• Options &gt; Registration &gt; <b>Promote/Demote Student</b></li> </ul> </li> <li>• Do you have any <b>Homeschooler's</b> registered with your school? If so, their <b>GrSubLvl</b> (Grade Sub Level) needs to read <b>HS</b>. <b>Add an</b> inclusion to the student's PSR if you have a student who is homeschooling. Please advise Serena or Madhav of any Home schoolers. Are any students that were previously homeschooled and registered with your school (or otherwise) now attending your school as a regular student? If so, remove the Grade Sub Level of <b>HS</b></li> <li>• Do you have any International students registered with your school? If so, their <b>GrSubLvl</b> (Grade Sub Level) needs to read <b>SU</b>. The Grade Sub Level may be removed just prior to first TRAX submission (mid-October).</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>	Enrollment and Demographics
Review Student Enrollment	<a href="#">School TT &gt; Student ST</a>	<p><b>Ensure there are no students with a Pre-Reg Enrollment Status</b></p> <ul style="list-style-type: none"> <li>• Student Top Tab &gt; Filter  - PreReg Students</li> </ul> <p><b>Do your Enrollment numbers match</b></p>	



		<p><b>the Current Members (bums in seats) Filter</b> ?</p> <ul style="list-style-type: none"> <li>• If not, compare the data in the filter with your own information</li> </ul> <p><b>Does the Current Members Filter</b>  <b>match the All Active Students (active anywhere in BC) Filter</b> ?</p> <ul style="list-style-type: none"> <li>• If not, compare the data from the two filters</li> </ul> <p><b>Current Members and All Active Students should match.</b> Once you find the student(s) in question, check their Membership details</p> <ul style="list-style-type: none"> <li>• <b>Student Top Tab &gt; Membership Side Tab</b></li> </ul> <p>Correct as necessary. If you need to change a student's</p> <p><b>Enrollment Status</b></p> <ul style="list-style-type: none"> <li>• <b>Student Top Tab &gt; Select the student.</b></li> <li>• <b>Options &gt; Registration &gt; Change Student Status</b></li> </ul>	
<p><b>Adding Students into Programs</b></p>		<p><b>Ensure that you have students added to correct 1701 fundable programs.</b></p> <ul style="list-style-type: none"> <li>• Do you have new AbEd students? Advise Admin Secretary for Aboriginal Education Department and she will add Program</li> <li>• Grade 8s will need to have the “Core French”, code #11002 program added</li> <li>• For French Immersion schools, ensure those participating in these programs have the FI program, not Core French.</li> <li>• ELL programs must be updated as per your conversation with your ELL teacher. The Learning Services department will manage any Exceptional English Language Learner programs.</li> <li>• If you register any new students from out of district that indicate on their registration forms that the student has been designated at their previous district, please ensure your Admin/Support department is aware and correct forms are completed. Learning Services will enter programs for these students.</li> </ul> <p><b>If you have new students to the school and they have open programs from</b></p>	

		their previous school, please click into the prior programs and end date them with the date the student left the previous school.	
<b>Students with secondary school associations</b>	<i>School view &gt; Student TT</i>	Do all secondary students have their attendance management type set appropriately? <b>Filter = Cross Enrolled FROM this school;</b> <b>Filter = All Secondary Students;</b>	Enrollment and Demographics
<b>Review fee assignments</b>	<i>School view &gt; School top tab &gt; Cashier's Office side tab &gt; Fees sub-side tab.</i>	Delete or void any outstanding fees for students who have left your school.	Fees Management
<b>Validate Staff Records</b>	<i>School view &gt; Staff top tab</i>	<ul style="list-style-type: none"> <li>Review staff roster and submit IT WebHelp Desk ticket for changes.</li> <li>Update staff homeroom assignments as necessary</li> </ul>	Security Management
<b>Staff Changes</b>		<b>If the school staff has changed DO NOT make any additions or deletions to the staff records in MyEdBC and do not make them inactive.</b> Staff must be assigned to schools from the DEO. Submit an IT Web HelpDesk ticket with full name of Teacher and FTE.	
<b>Assigning Homerooms to Teachers</b>	<i>School View &gt; Staff TT</i>	<b>Options &gt; Modify list</b> and click on the pencil  in the Homeroom column (don't forget to click on the <input checked="" type="checkbox"/> to save the changes to the column Alternatively, <b>Staff TT &gt; Select Staff &gt; Details.</b>	
<b>Assigning Homerooms to Students</b>	<i>School View &gt; Students TT</i>	<p><b>Option 1: Assigning a homeroom to an individual student:</b></p> <ul style="list-style-type: none"> <li>Check the box beside the student name and click the Details side tab, or click the blue link of the student name.</li> <li>In the Homeroom field on the Demographics sub-top tab, enter the homeroom assigned to the student.</li> <li>Click Save.</li> </ul> <p><b>Option 2: Modify individual student records in a list</b></p> <ul style="list-style-type: none"> <li>Click Options in the menu bar.</li> <li>Select Modify List.</li> <li>Click the 'Pencil' icon in the Homeroom field.</li> <li>Enter the homeroom value for each student in the list.</li> </ul>	

		<ul style="list-style-type: none"> <li>• Click the 'Green Check' icon to save the entries.</li> <li>• Click Options in the menu bar and select Modify List to shut the function off.</li> </ul> <p><b>Option 3: Mass Update</b></p> <ul style="list-style-type: none"> <li>• Place a check in the box beside each name to be assigned to the same homeroom.</li> <li>• Click Options in the menu bar.</li> <li>• Select Show Selected. The list of students selected appears for confirmation.</li> <li>• Click Options in the menu bar.</li> <li>• Select Mass Update</li> <li>• In the Mass Update pop-up window, set the Field value to Homeroom using the dropdown menu.</li> <li>• In the Value field, type the homeroom number to be assigned to all the selected students.</li> <li>• Click Update. Accept the confirmations.</li> <li>• A Mass-Updated validation window will pop up. Click OK.</li> </ul>	
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## Transferring Students to new Schools

If there are students that are transferring to new schools **in district** prior to the first day of school, follow the transfer process. The **incoming school** must set the withdraw reason from the previous school to either **no show** if they didn't attend at all, or **Public School/In District**. This will ensure the membership record is correct.

If there are students that are leaving the school for an **out of district** school prior to the first day of the school year, then **withdraw the student** with an appropriate reason (either **no show** or **Public School/Out of District**). This will ensure the membership record is correct.