

iPass Quick Guide: Back-to-School Checklist



The iPass Support Team has put together a checklist to help your district get off to a smooth start to the new school year. Links to more in depth Help resources and additional Quick Guides are included in the list.

- Complete your [EOY Procedures](#) steps:
 - Set up School Calendars with First/Last Day and add “no school” Holidays
 - Confirm Academic Year Setting have Term Start/End Dates & SCS “fake” Terms in same order as previous year (*change in order affects PCL Documents*)
 - Rollover Attendance to take attendance on the first day of school
 - Rollover Grades to enter grades and run GPA
 - Rollover Activities to new school year and [create new Activity/Groups](#)
 - Redefine YOG’s for Grade Levels to assign correct YOG for Grade Level
 - Assign Home Rooms by Grade Level or Student Schedules
 - [Alerts – Check and Re-Set Expiration Dates](#)
 - [Assign Horizontal Averaging Rules to Sections](#) for Honor Roll & GPA
 - Assign Counselors and Assistant Principals
 - Assign Lockers and Set Combination choice
 - Assign Bus Routes
 - [Annual set up for Narrative Parameters](#)
 - *NOTE: Do NOT assign Next Year School/Next Grade Level to student until the NEXT School Year has been defined. If assigned, submit a ticket to have a script run to clear out this “empty” Primary School/Year record.*
- Confirm all students have been enrolled on the first day of school
- Confirm all students have been scheduled into courses
 - Scheduling Report > Courses/Terms/Credits shows course # by student
 - [Quick Schedule by Homeroom](#)
 - [Remove courses vs. Drop](#) prior to start of school through Add/Drop Period
- Enter SASIDs for new students and set to Report to DOE = Yes
 - *NOTE: 2019-2020 - iPass is still using Export for SASIDS, sending file to DESE and Import SASIDs process for mass loading of SASIDs*
 - [Query for Enrolled students Report to DOE = No](#)
 - [Mass Update Students Report to DOE Setting](#)
 - [Report to DOE = Yes not saving](#)
- Reset Special Education and 504 codes for new school year
- Students not returning need a “[Summer Withdrawal](#)” record with a date during between previous year and new school year. *NOTE: The Primary School field must be blank so student is not included in the October SIMS transmission.*
- Schedule View for Staff – District Configuration set to Show Current & Prior Schedule
- iParent/iStudent Portal
 - [Create iStudent Accounts](#)
 - [Check activity of existing iStudent accounts](#)
 - Grant/Revoke viewing privileges for new school year



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- Show Grades Information = Current & Prior (*All shows Future Year*)
 - Show Schedule Information = Current & Prior (*All shows Future Year*)
 - Remove current year from "Hide Teacher Name and Room Number"
- [Google Translate](#) option
- ☑ [Import Student Email Addresses](#)
- ☑ Annual set up of Recurring Batch Reports for school year specific reports
 - [Quick Guide: Annual Set-Up of Recurring Batch Reports](#)
 - [Batch Report Query](#)
- ☑ Set up [Grade Headings and Terms](#) – Grade Headings must be set to "Include"
- ☑ Run [GPA Calculation](#) to roll-up previous end-of-year GPA to start new school year
- ☑ Set up [Auto-Attendance Letters](#)
- ☑ Assign Teacher Access – [Add new staff](#) and [remove Exiting staff](#)
- ☑ Exit Staff that is not returning
 - Unschedule prior to entering Career End Date of 07/01/YYYY
 - Remove Room selection from iStaff Profile (*Homeroom designation*)
- ☑ Set DOE Parameters > Last Transmission Date = 10/01/YYYY at each school in preparation for [October SIMS](#) and [SCS](#) State Reporting. All students enrolled up through this date will be included in the SIF Transmission.

