

School Year Start Up Checklist

1. **Confirm the School Profile is accurate.** Click the SCHOOL PROFILE tab and make any changes to the information that may be required. Don't forget to click the SUBMIT button at the bottom of the page to save these changes.
2. **Confirm your staff list is accurate.** Delete the staff who have left the school and create a new account for those who are new to the school year. To do this click the STAFF tab. Click the DELETE button to the right of any staff who have left the school. Use the ADD STAFF MEMBER button to create an account for any new staff. It is always a good idea to let new staff know that they will be receiving an email with their account information immediately after their account has been created. If you have staff whose teaching roles or locations where they will conduct interviews has changed since last school year, you will want to update this information in their staff accounts. To do this click the EDIT button to the right of the desired staff name. Because the teaching role and conference location become a part of the conference round configuration and confirmation email a parent receives it is important that you update this information before you create the round of conferences. In other words, if you don't update the staff account of a teacher who will be holding their conferences in a different room this year compared to last before you create a new conference round, then you may find parents wanting to see that teacher going to the wrong location.
3. **If you have teachers doing conferences together as a team, you will need to check to see the list of teaching teams is still current.** Click the STAFF tab and then the VIEW TEACHING TEAMS and you should see the teachers who conduct their interviews together using the same schedule. You can use the EDIT or DELETE buttons to the right of the names of the people on the team that have changed or you can click the CREATE TEACHING TEAM button located at the top of the page to create a new team.
4. **Once your school profile and staff list have been updated, you are ready to create the next round of conferences.** To do this, click the CONFERENCES tab and create a new round. The step by step wizard approach makes it easy to create your next round of conferences and the "Conference Sessions" or individual dates and schedules that make up that round.
5. If you are wondering what to do about the parent accounts for those students who have moved on from the school - the good news is you don't need to do anything. When the Conference Manager sends an email to all parents about upcoming conferences it includes a clear option to remove the parent account if the parent no longer has a child at the school. In addition to this, after 12 months of inactivity a parent account is automatically deleted.

For additional information, you can consult the **Next Round – Quick Start Guide**.

If you need support at any time, the best way to get a response is to email msupport@schoolsoft.ca. We are proud of the reputation we have for providing responsive customer support.