Purpose of This Document
This document is a checklist of items to be addressed prior to the start of a new academic session. Users should review this checklist along with referenced InformationNOW Quick Reference Guides and/or State Guidelines for complete details. Quick Reference Guides and State Guidelines may be accessed from http://support.sti-k12.com/documentation.

Note: Alabama public school districts should also refer to the InformationNOW AL - State Enrollment and Withdrawal document, which is available from the Chalkable Support site under Documentation | State Guidelines, for additional state-specific requirements.

Table of Contents

2016-2017 InformationNOW – Start of Year Procedures

<table>
<thead>
<tr>
<th>Purpose of This Document</th>
<th>1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table of Contents</td>
<td>1</td>
</tr>
<tr>
<td>Steps for Start of Year</td>
<td>2</td>
</tr>
<tr>
<td>Create an Academic Session</td>
<td>2</td>
</tr>
<tr>
<td>State Code Setup</td>
<td>2</td>
</tr>
<tr>
<td>Permission Maintenance</td>
<td>2</td>
</tr>
<tr>
<td>Attendance</td>
<td>2</td>
</tr>
<tr>
<td>Staff</td>
<td>3</td>
</tr>
<tr>
<td>Scheduling</td>
<td>4</td>
</tr>
<tr>
<td>School/District Settings</td>
<td>4</td>
</tr>
<tr>
<td>Home Portal Passwords</td>
<td>6</td>
</tr>
<tr>
<td>Grading Setup</td>
<td>6</td>
</tr>
<tr>
<td>Homerooms</td>
<td>7</td>
</tr>
<tr>
<td>Scheduling</td>
<td>7</td>
</tr>
<tr>
<td>Lockers</td>
<td>7</td>
</tr>
<tr>
<td>Enrolling Students</td>
<td>7</td>
</tr>
<tr>
<td>Fees</td>
<td>8</td>
</tr>
<tr>
<td>No-Show Reason Codes</td>
<td>9</td>
</tr>
<tr>
<td>Update Student Data</td>
<td>9</td>
</tr>
<tr>
<td>First Day of School</td>
<td>9</td>
</tr>
</tbody>
</table>
Steps for Start of Year

NOTE: When accessing the 2016-2017 academic session, a warning will display indicating that the user is accessing a future academic session. This warning will no longer display after the first day of school.

Create an Academic Session

The steps in this document are to be performed in the 2016-2017 academic session unless otherwise specified. Prior to performing the following steps, it is assumed that the 2016-2017 academic session has already been created. If it has not yet been created, please refer to the InformationNOW – Creating An Academic Session Quick Reference Guide for detailed steps.

State Code Setup

Go to http://support.sti-k12.com. Enter the user name and password and log in. Go to Documentation | State Guidelines. Download and review the latest State Guidelines to ensure any recent changes listed in the document have been implemented in InformationNOW.

Permission Maintenance

Review System Preferences | Permission Maintenance for all applicable User Groups. Academic Session permissions may need to be revised regarding access to past and/or future academic sessions.

Attendance

For complete details regarding attendance setup, please refer to the InformationNOW – Attendance and InformationNOW – Truancy Tracking Quick Reference Guides. Also check State Guidelines to determine possible requirements for state reporting.

Note: Some attendance setup can be copied using the Mgmt Console | Console | Share School Setup option.

- Attendance | Setup | Absence Reasons: Add any new codes for the coming school year. Delete or set inactive any codes that will not be used for the next school year.

- Attendance | Setup | Absence Levels: Verify that the absence reasons have been assigned to the appropriate attendance levels.

- School/District | School: Search for and select to View a school. Click the Acad Sessions tab. Select to View the 2016-2017 academic session.

  o View Year Calendar: Click View Year Calendar. Be sure that all attendance days have been filled with both Day Types and Bell Schedules. Click the links under the Manage menu on the left to assign Fill Day Types or Fill Bell Schedules.

Note: The school calendar can be created at one school and then copied to other schools in the district. Create the calendar at school A for the 2016-2017 academic session. Then go to Mgmt Console | Console | Share School Setup. Check School Calendar and then select the school(s)/academic session(s) to which to copy the calendar.
• **Attendance Month**: Check State Guidelines to determine if this is required. Click **Attendance Month**. Add each month with the **Name** and **Start/End Dates**.

Note: The attendance months can be created at one school and then copied to other schools in the district. Create the attendance months at school A for the 2016-2017 academic session. Then go to **Mgmt Console | Console | Share School Setup**. Check **Attendance Months/Quarters** and then select the school(s)/academic session(s) to which to copy the attendance months.

• **Attendance | Setup | Settings** tab:
  o Select whether settings are to be entered for the District <District Settings> or for the individual school. Select <District Settings> and choose the setup options for most of the schools in the district. Then, if there are schools that follow a different setup, select the school from the list, bullet **Use Different Attendance Settings** and select the options for that school.
  o Confirm that the **Attendance Unit** and **Percentages/Minutes** are correct per State Guidelines.
  o Confirm that the correct **Skip Reason** is selected. This is the code that will be assigned when a daily absence record (missing) is posted from the teacher classroom or Chalkable Classroom unless the teacher has permission to **Maintain Classroom Absence Reasons**.
  o Select the appropriate **Daily Tardy Assignment** option.
  o Select the appropriate **Period Tardy Reason**.
  o Enter the appropriate **Absence Reasons** and **Threshold** for truancy tracking.

• **System Preferences | Setup | Bell Schedules**: Verify **Code, State Code, SIF Code, NCES/Other** codes. Confirm start/end times for each period/block. Be sure to enter **Instructional Minutes** for all bell schedules.

### Staff

For more details regarding staff members, please refer to the InformationNOW – Staff Quick Reference Guide.

- Add new staff members.
- Reset staff Leave Days.

Warning! This must be done in the previous academic session (ex. 2015-2016). DO NOT perform these steps in the 2016-2017 academic session!

- Log in to the previous academic session (ex. 2015-2016). DO NOT perform these steps in the 2016-2017 academic session!
  - Review the settings for the various leave types. In the 2015-2016 academic session, go to **Staff | Setup**. Select **Leave Type** from the list and click **Refresh**. Click to **View** each leave type. Check that the settings are correct under the **When resetting staff leave days...** option.
  - To reset staff leave days, in the 2015-2016 academic session, go to **Mgmt Console | Console**. Click **Reset Staff Leave Days**. Staff leave days will be reset based on options selected in the previous step.

Note: When finished, log back in to the 2016-2017 academic session before proceeding.

- For staff members who are not returning, users may enter an end date on the **Classification** tab: Go to **Staff | Staff Maintenance**. Search for and select to **View** the staff member. Click the **Class** tab. Click to **View** the staff classification record. Enter an **End Date**.

  Note: Consult State Guidelines to determine the proper manner for handling non-returning staff:
**Scheduling**

- **Scheduling | Setup | Terms**: If Terms were not added when the new academic session was created, they may be added. Verify the terms and dates are correct. For more details regarding terms, please refer to the *InformationNOW – Creating an Academic Session* Quick Reference Guide.

- **Scheduling | Setup | Periods**: Confirm Periods are correct for the upcoming school year. If indicated as required in the State Guidelines, enter state codes for the periods.

- **Scheduling | Setup | Bell Schedules**: Verify Bell Schedules, including variations, are set up with appropriate instructional time. Passing times may be excluded from the Bell Schedule.

- **Scheduling | Master Schedule**: If using Period Variations, be sure that correct period variation is selected for sections where variations apply.

**School/District Settings**

Refer to the *InformationNOW – School-District Options, InformationNOW – Fees or InformationNOW – Attendance* Quick References Guides for further details on these procedures.

**School/District | District**

- Update district Announcements.
- Verify Enrollment tab settings including Enrollment, No Show and Withdrawal options as well as the Disallow Duplicates and Reporting School options.
  
  Check the options under the Copy section that should be available to use when enrolling students. Items that are not checked in the Copy section of this tab will not be available from the Students | Mass Enrollment screen or when a user enrolls a single student.

  Consider disabling the No Show option after the first few days of school to prevent users from incorrectly marking students as no-show.

  Also, the Withdrawal date school enters is student’s option should be set to the first day of non-attendance unless otherwise specified in the State Guidelines.

- Update district Home Portal settings including the types of System Preferences alerts to which home portal users may subscribe.

**School/District | Setup**

Go to School/District | Setup.

- On the Lookup tab, update any existing and add any new codes including the new District Letters and Grade Book Category options.

- Click the Settings tab. Check all of the settings including but not limited to the following:
  
  - **Fiscal Year**: Enter the Month and Day for the start of the current fiscal year if tracking fees.
  
  - **Login Grace Period**: Enter the number of days a user may still log into an academic session even after the session has ended. This applies only to users who do not have permission to access a past academic session.

  - **State ID Numbers**: Check if users are allowed to edit student’s State ID numbers on the individual student’s Misc tab.

  - **Automatically Recalculate Grade Book**: Check if the student’s grade book running average is to automatically be recalculated when a student’s score record is edited. In some instances, this may affect overall speed and performance for users. This affects InformationNOW Classroom only. Chalkable Classroom averages are updated each time a score is entered or edited.
School/District | School
Go to School/District | School. Search for and select to View the school. Check the following settings:

- **Academic Sessions** tab: Confirm the next academic session has been added. For details regarding adding an academic session, please refer to the InformationNOW – Creating an Academic Session Quick Reference Guide. To verify the session has been created, from the school view screen, select the Acad Session tab. Select the school year from the list and click Refresh. Confirm the upcoming academic session is listed. Click to View the new academic session.
  
  o **Visible in Home Portal**: Check if this academic session is to be viewed by users of the home portal.

  Note: Users may wish to access last year’s academic session and uncheck the Visible in Home Portal box if viewers are not allowed to view last year’s information.

  o **Day Types**: Click the Day Types tab. Verify the required day types for the upcoming academic session have been created.

  o **Attendance Month**: Select Attendance Month under the Manage menu on the left. Refer to State Guidelines to determine if this is required.

  Note: Attendance Months must be set up for users to generate the Monthly Attendance Register report.

  o **View Year Calendar**: Select View Year Calendar under the Manage menu on the left.

    ▪ **Day Types**: From the Manage menu on the left, select to Fill Day Types.

    ▪ **Bell Schedule**: From the Manage menu on the left, select to Fill Bell Schedule.

    ▪ **Non Attendance Days**: Refer to the State Guidelines for instructions on either removing or marking non-attendance days on calendar.

    ▪ **Exception Calendar**: From the Manage menu on the left, select to create an Exception Calendar if necessary.

  Note: Exceptions for an entire grade level may be entered from the View Academic Session screen by selecting the Grade Exception Calendar link under the Manage menu on the left. An exception calendar may be assigned to an individual student on the School tab of the student under student maintenance. Students may only have one exception calendar, either by grade level or the School tab, not both. Refer to State Guidelines to determine if this is required.

- **Rooms** tab: Add/update rooms. Assign staff to rooms where applicable. Assigning staff is not necessary. However, if staff members are assigned to rooms, when a staff member is added to a section in the master schedule the room will automatically be populated on the section based on the teacher’s room assignment.

- **Announce** tab: Enter applicable announcements to be displayed for the various user groups.

- **Setup** tab:

  o **Earliest Payment Date**: Enter the date of the earliest payment to be received for fees charged for the selected academic session.

  o **Current Receipt Number**: Enter the receipt number to be used for the next receipt that is issued for the school. Ex.: If receipt numbers are to start with the current academic school year followed by 00001, enter a 201700001.

  o **Grade Book**: Select desired options applicable to teacher grade book including averaging method and standard options.

  o **Overwrite existing attendance when posting from discipline**: Check if a student’s existing attendance record should be overwritten if a discipline record is entered from which an attendance record will be created.
Time Zone Settings: If this school is in a different time zone from the school district, select the time zone here and check if this school observes daylight savings time.

Home Portal: Select the options that can be viewed from users of the home portal such as students or guardians. If allowing requests to be entered, select the Course Requests academic session. When students or guardians enter course requests, the requests will be entered in the academic session that is selected.

Grading Levels link: Verify that only grade levels within the school and the incoming grade level are marked.

Grading Scales link: Verify that a grading scale is selected for each grade level. This sets a default grading scale for the grade level. This grading scale may be overridden by a grading scale on the Master Schedule Course/Section, student School tab, or student Schedule, Course/Section.

Home Portal Passwords

Assign home portal passwords to contacts and/or students. Go to Utilities | Assign Home Passwords. Refer to the InformationNOW - Utilities Quick Reference Guide for more details.

Grading Setup

For details regarding these steps, please refer to the InformationNOW - Grading Quick Reference Guide.

- Grades | Setup | Settings tab: Confirm the appropriate settings are selected for Class Rank, Weighting, Transcript History and Report Card GPA detail and Minimum grade for Rank and GPA. Also select the Transcript Display Grade to determine the type of grade that will display on the student’s transcript screen – Alpha, Numeric or Both.


- Grades | Setup | Grading Periods:

  Note: Grading periods can be created at one school and then copied to other schools in the district. Create the grading periods at school A for the 2016-2017 academic session. Then go to Mgmt Console | Console | Share School Setup. Check Grading Period Setup and then select the school(s)/academic session(s) to which to copy the grading periods.

  - Confirm the Start/End Dates are correct for each grading period and term.
  - Enter a School Announcement to be printed on report cards for the selected grading period.
  - Check Allow Posting for any grading periods for which teachers may post grades. Uncheck for any grading periods for which teachers should not be allowed to post currently.
  - Review/Add each graded item to be collected for the selected grading period (i.e., Quarter Grade, Semester Average), along with the options for each item. Click the Average Setup link for any calculated graded item to ensure the appropriate percentages/exemptions have been assigned. Check the Final Grade box for any grades that are to be considered the final grade for state reporting purposes.

- Grades | Setup | Valid Alphabetic Grades: Enter any new valid alphabetic grades to be used for the upcoming school year. Check State Guidelines for state codes.

- Grades | Setup | Grading Scales: Confirm scales are correct and that any newly added valid alphabetic grades have been assigned the appropriate high/low and averaging equivalent. Check State Guidelines for Passing Yes/No. Also verify values in GPA method, and Apply Weight Yes/No. Select if Alpha, Numeric or Both grades are to display in the Home Portal for students/guardians.

- School/District | School: Search for and select to View a school. Click the Grading Scales link under the Manage menu at left and assign appropriate grading scales to the grade levels.

- System Preferences | Setup | Grade Book Category: Grade book categories may set up school-wide for all teachers. To set up categories, go to System Preferences | Setup. Select Grade Book Categories

and click Refresh. Insert any categories that are to be used by teachers in the grade book. When a category is created it will be copied to all teacher grade books. If a teacher tries to access the Categories menu within the Grade Book, a lock icon will display next to the category that was created by the school. If the user places their mouse of the lock a message will display indicating the category was created by the school.

**Homerooms**
Assign homerooms to students. For details, please refer to the *InformationNOW – Homerooms* Quick Reference Guide. Refer to State Guidelines to determine if homerooms are required.

**Scheduling**
For details, please refer to the *InformationNOW – Scheduling* Quick Reference Guide.

- **Scheduling | Reports | Incomplete Schedules**: Verify students have complete schedules.
- **Scheduling | Reports | Student Schedule List**: Confirm students are enrolled in courses.
- **Walk-In Scheduling**: Add schedule to student under Students | Student Maintenance. Search for and select to View a student. Click the Schedule link under the Manage menu on the left. If the student’s schedule is blank, users may click the Copy A Schedule link to copy a schedule from an existing student to this student. Users may also click Add to insert individual courses or use the Apply Model (schedule) option to apply a schedule model to a student. Users may alternately choose to select the Requests link from the main student screen and either click to Apply Model (request) or manually enter requests. Then click Schedule from the request screen to schedule the requests. Alternately, users may select the Schedule Matrix from the main student’s screen and use the grid to schedule/move sections in the student schedule.

**Lockers**
Please refer to the *InformationNOW – Lockers* Quick Reference Guide for more details. Only clear lockers if students are not using the same lockers for the 2016-2017 school year.

- Clear lockers from the previous school year by going to School/District | Lockers. Click the Clear Lockers tab and follow the steps as outlined.

Note: Lockers should have been cleared for last years outgoing students during the end-of-year process. If lockers for outgoing students were not cleared at the end of the 2015-2016 academic session, users should log into the 2015-2016 academic session and clear lockers for all students in the 2015-2016 academic session. If lockers were cleared for all students in the 2015-2016 academic session, it is not necessary to clear in the 2016-2017 academic session.

- If using various indexes for locker combinations, select the appropriate index for the 2016-2017 school year under School/District | Lockers and on the System Index tab. When lockers are assigned to students, the appropriate combination will be assigned based on the index selected here.
- Assign lockers to students under School/District | Lockers and on the Locker Assignment tab. Follow the steps as outlined.

**Enrolling Students**
Under Scheduling | Setup | Terms, enter term dates before enrolling students. Also, if there is a chance the school Begin Date might change due to inclement weather or other policy change, it is recommended that users refrain from mass-enrolling students until just prior to the first day of school.

Enroll Group of Students

- **Students | Mass Enrollment**: Mass-enroll all currently registered students. Student attendance may not be taken until students have been enrolled.
  - **Search**: Enter the filter criteria for the students who may be selected to be enrolled. Click **Search**.
  - **Select**: Place a check next to the student(s) to be enrolled and click **Enroll**. Only currently registered students will display on the selection list.
  - **Reported Date/Time**: Enter the *Reported Date*. Check the State Guidelines to determine if *Time* (i.e., the start time of the first day of school) is required, otherwise leave blank.
  - **Enrollment Code**: Select the *Enrollment Code* to be assigned to all selected students.
  - **Enrollment Reason**: Select the Enrollment *Reason* to be assigned to all selected students.
  - **Notes**: Enter any *Notes* to be added to each selected student’s enrollment record.
  - **Copy from previous Academic Session**: Select if the student is to be enrolled with the same *Bus Routes/Stops, District Services, Grade Level, Homeroom, Lunch Code, School Programs, Student FTE, or Transportation Code* that the student was assigned in the previous academic session.

  Note: Items that are not checked under **School/District | District | Enrollment** tab will not be able to be checked on the student mass enrollment screen. If *Lunch Code* and/or *Transportation Code* are not checked, it will use the default *Lunch Code* and/or *Transportation Code* that is selected under **Default Enrollment Values**.

  Also, the **District Services** option is disabled for Alabama and Tennessee public school districts due to state reporting requirements.

  - **Default Enrollment Values**: Select the *Lunch* and *Transportation* codes to be assigned to all students. If using the **Copy from Previous Academic Session** option, previously enrolled students will receive the codes they were assigned in the previous academic session rather than the codes selected here.

    Note: If the school/district has created fee exceptions based on student lunch status, changing a student’s lunch status may affect the amount of the fee charged to the student.

  - **Exclude from Class Rank**: Check if all enrolled students are to be excluded from class rank.

Enroll Single Student

To enroll a single student, go to **Students | Student Maintenance**.

- Search for and select to **View** the student.

  Note: When searching, uncheck the **Currently Enrolled Students** box prior to clicking **Search** to include students who are not currently enrolled in the search results.

- Click the **Enrollment** tab.
- Click to **Enroll** the student
- Enter all applicable data including required fields which are indicated with an asterisk (*).

Fees

- If tracking fee information, verify fee categories, accounts, prorations, exceptions and course fees are correct. Refer to the *InformationNOW – Fees* Quick Reference Guide.
• Mass apply fees to students under **Fees | Mass Assign Fees** that were set up as accounts (ex. *Locker, Registration*).

• Post Course Fees to students under **Management Console | Console | Post Course Fees** that were assigned to the courses under **Scheduling | Valid Courses** and under the **Course Fees** link.

**No-Show Reason Codes**

Insert or update reason codes for no-show students. Refer to state guidelines for any required reason codes. Go to **System Preferences | Setup**. Select *Enrollment Reason* from the list and click **Refresh**. Edit existing codes or add new codes for no-show students (ex. *Did Not Return*, *Summer Completer*, *Unknown*). Check the **Class** of **NoShow**.

**Update Student Data**

Use **Students | Quick Entry/Edit** to mass change student data:

• **School Next Year**: Clear for incoming students and set for outgoing students by grade level.

• **Counselor**: If specific counselors are assigned to students, update the counselor for all students.

• **Reporting School**: Reset for incoming students.

• **Expected Graduation Date**: Set for Grade 12 students.

• **Custom Fields**: Populate or clear necessary fields on the *Custom* tab for state reporting purposes. Refer to State Guidelines for a list of fields used for state reporting.

**First Day of School**

• Take student attendance.

• Generate an attendance report under **Attendance | Reports | Daily Absence Listing**.

• Process any “No-Show” students who did not attend the first day of school according to district policies or Chalkable *InformationNOW* State Guidelines. Students may be marked individually as no show under **Students | Student Maintenance** from the individual student’s *Enrollment* tab or under **Students | No Show**.

Note: Check State Guidelines to determine if “No-Show” is an option for the district based on state-reporting requirements.

Note: **Alabama public** school districts must refer to the *InformationNOW AL - State Enrollment and Withdrawal* Quick Reference Guide, available from the Chalkable Support Web site, for Alabama-specific steps.