Beginning of year checklist

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The Beginning of Year Checklist provides information on activities that must be completed in Infinite Campus before the first day of school.

There is no specific order for completing these tasks, as long as they are completed before the first day of school. Links to appropriate content are listed in the Notes column, along with other helpful information about the task.

As always, follow your district's policies and guidelines when completing these tasks.

Campus is a living solution that’s continually improved to deliver the latest features. Check out the latest releases to stay up to date on new tools and product updates that may have occurred over the summer.

School Information

Done	Task	Notes
	Modify the **school year** marked as active to be the new school year—e.g., 2025-26 to 2026-27.	This change displays the current school year calendars as the first option in the Context Switcher and displays student enrollments for that year in bold, among other things. Most districts follow a fiscal year for start and end dates, from July 1 to June 30. Only one school year can be marked active at a time. When the Active checkbox is marked on the selected year and saved, the Active checkbox on the previous selection is automatically removed. See the following for more information: • School Year Setup article • Define School Year Detail and Preferences video

Done	Task	Notes
	Review and make necessary changes to **District and School Information** for accuracy.	These modifications are mostly contact information, like the Principal's name, phone numbers, etc. Sometimes, a school's serving population changes as it relates to Title 1 or School Lunch Programs. See the following for more information: • District Information article • District Information video • School Information article • School Information video
	For schools using Ed-Fi, review **Ed-Fi Setup** information.	This is often localized for your state. Refer to that information for guidance. See the following for more information: • Getting Started with Ed-Fi article • Understand Ed-Fi video

Calendar Information

Done	Task	Notes
	Enter the correct **Calendar Start and End Dates**, with extra days at the beginning (before the first day of school) and the end (after the last day of school).	During the scheduling process, the start date of the next school year may not have been known. By the start of the school year, this date is finalized, and changes can be made. See the following for more information: • Calendar Information article • Calendar Details video

Done	Task	Notes
	Reset the **Calendar Days** to account for in-service days, holidays, day rotation, etc., and ensure attendance can be taken on the first day of school.	Once the date is finalized, the calendar days need to be updated. This reset process is needed to update the day count on the calendar, ensure accurate placement of non-school days, and ensure attendance is recorded accurately. See the following for more information: • Calendar Days article • Understand Calendar Days video • Manage School Calendar Days video
	Review the **Term Start and End Dates** for the correct entries.	Term dates display on the student's Schedule and in the Grade Book, along with several other places. See the following for more information: • Calendar Terms article • Understand Calendar Terms video • Define Terms and Term Dates for a School video

User Access

Done	Task	Notes
	Add **Calendar Rights** for the new School Year to users/user groups, and verify assigned **tool rights** for users/user groups.	Calendar rights determine which school, calendar, and year the user has access to view and modify. They work in tandem with Tool Rights. See the following for more information: • Calendar Rights article • Calendar Rights video

Done	Task	Notes
	Review and update **Tool Rights** and **User Group Membership**, and add the correct Calendar rights to the user groups.	Tool rights control what a user can do in Campus. For maintenance purposes, administrators first create User Groups, then assign individuals to the group; then, tool rights are assigned to the group level. See the following for more information: • Tool Rights Catalog • User Groups and Suggested Tool Rights • User Tool Rights article • User Tool Rights video
	Review the selected **Display Options** and **Self Service Options** for Campus Student and Campus Parent, and make any necessary changes.	These options can be changed throughout the year. Districts might choose to only show Course Registration tools during that time of the year (spring) or not show behavior information at all. See the following for more information: • Display Options article • Self Service Options article • Portal Display Options video

General

Done	Task	Notes
	Review **System Preferences** for any changes needed.	System Preferences control a variety of settings - enrollment configurations, grade calculations, etc. Be aware that any changes made affect ALL school years and ALL school calendars. See the following for more information: • System Preferences article

Done	Task	Notes
	Add **Attendance Codes** and map accordingly to attendance statuses and state attendance codes, if needed.	Attendance codes may not change every year, but do verify that any changes to codes, either from the district or new state codes that have been added, are mapped to the correct codes. State attendance codes are used in state reports and Ed-Fi resources. See the following for more information: • Attendance Codes article • Attendance Code Setup video
	Verify **Behavior Events** and **Resolutions** are entered.	As with Attendance Codes, Behavior Events and Resolutions may not change every year. Verify newly approved state codes are mapped to the correct codes. See the following for more information: • Behavior Events Types article • Behavior Event Type Setup video • Behavior Resolution Types article • Resolution Type Setup video
	Review **Locker** information.	Locker maintenance includes several steps. See the following for more information: • School & District Settings Lockers • Locker Setup and Management video
	Modify **Report Cards, Transcript Reports, Schedule Reports, eTranscript Reports** for use in the current year.	These reports are often rolled forward with the calendar attributes year to year. See the following for more information: • Report Setup article • Report Setup video

Staff

Done	Task	Notes
	Check **District Assignment** records, verifying the correct checkbox is marked for that staff person's role.	The District Assignment record shows where the staff person performs the majority of their job duties - a particular school or building within the district with a particular role. This is especially important for teachers to ensure the teacher checkbox is marked on the District Assignment record. Without that, they cannot be assigned to course sections. See the following for more information: • District Assignment article • Manage District Assignments video
	Verify that all staff have **District Employment** records.	A District Employment record indicates that the staff person is employed by the district. See the following for more information: • District Employment article • Manage District Employment Records video

Census

Done	Task	Notes
	Review households, addresses, communication, and other demographic and contact information by generating the **Census Verification Report**.	The Verification Report can be sent to parents/guardians for review or handed out at Back School Night for attendees to review. See the following for more information: • Census Verification Report article

Done	Task	Notes
	Verify the correct **Guardian** and **Household** checkboxes are accurate.	The Guardian and Mailing checkboxes are used in reports and in logic that determine how student information is displayed. It is recommended that this information be reviewed regularly. See the following for more information: • Relationships article • Relationships video • Household Information article • Understanding Census video

Student Information

Done	Task	Notes
	Review student **Enrollment Records** for the current school year, checking for the correct start date (first day of school) and the correct start status. Also, verify **that Enrollment Records** for past school years have end dates (if needed for state reporting).	An incorrect start date affects the student's attendance records, schedule information, teacher grade book information, and reports. Certain states do not require past enrollments to be ended. For states that do require it, enrollments in past years that have not ended affect many reports and cause inaccurate counts. See the following for more information: • Enrollment Records article • Enrollments video

Done	Task	Notes
	Verify **lockers** used by last year's graduating seniors have been end-dated and are available for reassignment. Verify that lockers have been assigned to **students**.	Use the Locker Batch End Wizard to end locker assignments. Then, use the Combination Rotation Wizard to adjust locker combinations. After that, new lockers can be assigned to students. See the following for more information: • School & District Settings Lockers • Locker Batch End Wizard • Locker Setup and Management video • Combination Rotation Wizard article • Combination Rotation Wizard video
	Run the **Student Gap Scheduler** to find empty periods in students' course schedules.	During the spring scheduling season, students were scheduled into sections based on their course requests. There is a chance that some students did not get the courses they wanted, or that some students still need to be hand-scheduled for some periods. The Student Gap Scheduler can fill those empty periods with a study hall or prep period. See the following for more information: • Student Gap Scheduler article • Student Gap Scheduler video
	Ensure **Transcripts** are up to date through the end of the last school year.	The Post to Transcripts tool is used after final grades have been entered by teachers at the end of the school year. Summer school grades may need to be posted as well. See the following for more information: • Transcripts article • Transcripts video • Post to Transcripts article • Run Transcript Post video

Course Information

Done	Task	Notes
	Verify the appropriate **Scheduling Board Trial** has been set to active.	A Trial determines the placement of course sections and class rosters. The scheduling process may be completed very close to the start of the year. Use the Scheduling Center to track what still needs to be completed. See the following for more information: • Scheduling Board article • Scheduling Center article • Scheduling Center video
	Verify that all Courses being taught for the current school year are active, have sections created, and have teachers assigned to those sections.	This task may have been addressed during the spring scheduling season. For any course added over the summer, or for any school that regularly creates courses, do a spot check to ensure the Active checkbox is marked. Or generate an ad hoc report to find all active courses. See the following for more information: • Course Information article • Course Information video
	Mark the **Attendance** checkbox on all courses that track attendance.	This is the first thing to verify when a teacher says they can't take attendance. See the following for more information: • Course Information article • Course Information video
	Ensure the **Sections** of the course are marked to meet in the correct period and term.	It is NOT recommended to make changes to section placement (or any other course information) after the start of school. See the following for more information: • Course Sections article • Course Sections video

Done	Task	Notes
	Make sure **Course Sections** have students scheduled on the first day of class.	Sections that do not have any students scheduled into them can be deleted, if desired. Or, they can be left as is, perhaps for an overflow section. See the following for more information: • Section Roster article • Section Roster video
	Verify **State Reporting Codes** have been entered on appropriate courses.	This may not be needed in your state. When it is, review the entered codes for accuracy, as some education departments modify them over the summer. See the following for more information: • Course Information article • Course Information video
	Mark the **Lunch Count** and **Milk Count** checkboxes, if applicable, on Course Sections.	This option is mostly for elementary schools. See the following for more information: • Sections Information article • Course Sections video
	Verify **Grading Tasks** and **Standards** have been assigned to courses, and the appropriate task/standard is marked for posting to the student's transcript.	Teachers cannot post grades that are not assigned grading tasks. See the following for more information: • Grading Tasks article • Course Grading Tasks video • Standards article • Course Standards video
	Review the entered **GPA weight** for courses that contribute to the student's transcripts.	See the GPA Calculations in Campus for additional guidance.

Done	Task	Notes
	Ensure **Score Groups/Rubrics** and **Grading Scales** are accurate.	Grading scales are used by the Campus grade book to convert numeric percentages to In Progress grades. That scale is associated with Score Groups to determine passing scores. See the following for more information: • Grading Scale Setup article • Grading Scale Setup video • Score Groups and Rubrics article • Create Score Groups video • Create Rubrics video

Instruction

Done	Task	Notes
	Ensure teachers can view information for each of their assigned course sections.	N/A
	Verify that teachers can take **attendance** for their courses.	Teachers cannot take attendance until the first day of school, but make sure the Attendance checkbox is marked on the course editor, the teacher checkbox is marked on the staff person's District Employment record, and the teacher is assigned to the course section. See the following for more information: • Teacher Attendance

Fees

Done	Task	Notes
	Verify **that fees** have been created and assigned to students.	See the following for more information: • Fees article • Fees video • Student Fees article

Done	Task	Notes
	Assign **Course Fees** to courses.	See the following for more information: • Course Fees Assignment Wizard article • Course Fees Assignment Wizard video
	Set Fee Maximums.	See the following for more information: • Fee Maximums article • Fee Maximums Setup video

FRAM

Done	Task	Notes
	Review and make appropriate changes to FRAM Preferences.	See the following for more information: • FRAM Preferences article • FRAM Preferences video
	Create FRAM Letters.	See the following for more information: • FRAM Communication article • FRAM Communication video

Food Service

Done	Task	Notes
	Perform a POS Data Load on every terminal.	See the following for more information: • Terminal Installation and Configuration article
	Review the Summer Maintenance tasks for Food Service and revisit the End of School Year information.	See the following for more information: • Summer Maintenance Tasks video • End of School Year Process for Food Service article

Activity Registration

Done	Task	Notes

Done	Task	Notes
	Roll forward your school's activities.	See the following for more information: • Activity Roll Forward article • Activity Roll Forward video

School Store

Done	Task	Notes
	Create new products that are specific for the school year.	See the following for more information: • General Product article • General Product video
	For Campus Mobile Payments, verify that the events (especially for the fall season) are created.	See the following for more information: • Events article • Events video

Congratulations!

You have successfully completed all necessary tasks for the beginning of the school year. In a few days, the halls will be filled with students and teachers eager to get started learning!