

# Beginning of Year Checklist

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The Beginning of Year Checklist provides information on certain activities that need to be performed within Infinite Campus prior to the first day of school.

There is no specific order in which these tasks need to be completed, just as long as they are completed prior to 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 provide you with the latest features. Check out the [latest releases](#) to stay up to date on new tools and modifications to the product that may have occurred over the summer.

## School Information

Done	Task	Notes
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Done	Task	Notes
	<p>Modify the <b>school year</b> that is marked as active to be the new school year - e.g., 2022-23 to 2023-24.</p>	<p>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.</p> <p>Most districts follow a fiscal year for start and end dates, from July 1 to June 30.</p> <p>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.</p> <p>See the following for more information:</p> <ul style="list-style-type: none"> <li>• <a href="#">School Year Setup</a> article</li> <li>• <a href="#">Define School Year Detail and Preferences</a> video</li> </ul>
	<p>Review and make necessary changes to <b>District and School Information</b> for accuracy.</p>	<p>These modifications are mostly contact information, like Principal's name, phone numbers, etc. Sometimes there are changes to a school's serving population as it relates to Title 1 or School Lunch Programs.</p> <p>See the following for more information:</p> <ul style="list-style-type: none"> <li>• <a href="#">District Information</a> article</li> <li>• <a href="#">District Information</a> video</li> <li>• <a href="#">School Information</a> article</li> <li>• <a href="#">School Information</a> video</li> </ul>
	<p>For schools using Ed-Fi, review <b>Ed-Fi Setup</b> information.</p>	<p>This is often localized for your state. Refer to that information for guidance.</p> <p>See the following for more information:</p> <ul style="list-style-type: none"> <li>• <a href="#">Ed-Fi</a> article</li> <li>• <a href="#">Understand Ed-Fi</a> video</li> </ul>

## Calendar Information

Done	Task	Notes
	Enter the correct <b>Calendar Start and End Dates</b> , 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: <ul style="list-style-type: none"> <li>• <a href="#">Calendar Information</a> article</li> <li>• <a href="#">Calendar Details</a> video</li> </ul>
	Reset the <b>Calendar Days</b> 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 reset the day count on the calendar, to get an accurate placement of non-school days, and to have attendance be accurately recorded.  See the following for more information: <ul style="list-style-type: none"> <li>• <a href="#">Calendar Days</a> article</li> <li>• <a href="#">Understand Calendar Days</a> video</li> <li>• <a href="#">Manage School Calendar Days</a> video</li> </ul>
	Review <b>Term Start and End Dates</b> 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: <ul style="list-style-type: none"> <li>• <a href="#">Calendar Terms</a> article</li> <li>• <a href="#">Understand Calendar Terms</a> video</li> <li>• <a href="#">Define Terms and Term Dates for a School</a> video</li> </ul>

## User Access

Done	Task	Notes
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Done	Task	Notes
	Add <b>Calendar Rights</b> for the new School Year to users/user groups, and verify assigned <b>tool rights</b> for users/user groups.	<p>Calendar rights determine which school, calendar and year the user has access to view and modify. They work in tandem with Tool Rights.</p> <p>See the following for more information:</p> <ul style="list-style-type: none"> <li>• <a href="#">Calendar Rights</a> article</li> <li>• <a href="#">Calendar Rights</a> video</li> </ul>
	Review and update <b>Tool Rights</b> and <b>User Group Membership</b> , and add the correct Calendar rights to the user groups.	<p>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.</p> <p>See the following for more information:</p> <ul style="list-style-type: none"> <li>• <a href="#">User Tool Rights</a> article</li> <li>• <a href="#">User Tool Rights</a> video</li> </ul>
	Review the selected <b>Display Options</b> and <b>Self Service Options</b> for Campus Student and Campus Parent, and make any necessary changes.	<p>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.</p> <p>See the following for more information:</p> <ul style="list-style-type: none"> <li>• <a href="#">Display Options</a> article</li> <li>• <a href="#">Self Service Options</a> article</li> <li>• <a href="#">Portal Display Options</a> video</li> </ul>

## General

Done	Task	Notes
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Done	Task	Notes
	Review <b>System Preferences</b> for any changes needed.	<p>System Preferences control a variety of settings - enrollment configurations, grade calculations, etc.</p> <p>Be aware that any changes made affect ALL school years and ALL school calendars.</p> <p>See the following for more information:</p> <ul style="list-style-type: none"> <li>• <a href="#">System Preferences</a> article</li> </ul>
	Add <b>Attendance Codes</b> and map accordingly to attendance statuses and state attendance codes, if needed.	<p>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.</p> <p>State attendance codes are used in state reports and Ed-Fi resources.</p> <p>See the following for more information:</p> <ul style="list-style-type: none"> <li>• <a href="#">Attendance Codes</a> article</li> <li>• <a href="#">Attendance Code Setup</a> video</li> </ul>
	Verify <b>Behavior Events</b> and <b>Resolutions</b> are entered.	<p>As with Attendance Codes, Behavior Events and Resolutions may not change every year. Verify newly approved state codes are mapped to the correct codes.</p> <p>See the following for more information:</p> <ul style="list-style-type: none"> <li>• <a href="#">Behavior Events Types</a> article</li> <li>• <a href="#">Behavior Event Type Setup</a> video</li> <li>• <a href="#">Behavior Resolution Types</a> article</li> <li>• <a href="#">Resolution Type Setup</a> video</li> </ul>
	Review <b>Locker</b> information.	<p>Locker maintenance includes several steps.</p> <p>See the following for more information:</p> <ul style="list-style-type: none"> <li>• <a href="#">Locker Management</a> article</li> <li>• <a href="#">Locker Setup And Management</a> video</li> </ul>

Done	Task	Notes
	Modify <b>Report Cards, Transcript Reports, Schedule Reports, eTranscript Reports</b> for use in the current year.	<p>These reports are often rolled forward with the calendar attributes year to year.</p> <p>See the following for more information:</p> <ul style="list-style-type: none"> <li>• <a href="#">Report Setup</a> article</li> <li>• <a href="#">Report Setup</a> video</li> </ul>

## Staff

Done	Task	Notes
	Check <b>District Assignment</b> records, verifying the correct checkbox is marked for that staff person's role.	<p>The District Assignment record tells where the staff person performs the majority of their job duties - a particular school or building within the district with a particular role.</p> <p>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.</p> <p>See the following for more information:</p> <ul style="list-style-type: none"> <li>• <a href="#">District Assignment</a> article</li> <li>• <a href="#">Manage District Assignments</a> video</li> </ul>
	Verify all staff have <b>District Employment</b> records.	<p>A District Employment record states the staff person is employed at the district.</p> <p>See the following for more information:</p> <ul style="list-style-type: none"> <li>• <a href="#">District Employment</a> article</li> <li>• <a href="#">Manage District Employment Records</a> video</li> </ul>

## Census

Done	Task	Notes
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Done	Task	Notes
	Review households, addresses, communication and other demographic and contact information by generating the <b>Census Verification Report</b> .	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: <ul style="list-style-type: none"> <li>• <a href="#">Census Verification Report</a> article</li> </ul>
	Verify the correct <b>Guardian</b> and <b>Household</b> checkboxes are accurate.	Guardian and Mailing checkboxes are used frequently in reports and in logic that determines how student information displays. A regular review of this information is recommended.  See the following for more information: <ul style="list-style-type: none"> <li>• <a href="#">Relationships</a> article</li> <li>• <a href="#">Relationships</a> video</li> <li>• <a href="#">Household Information</a> article</li> <li>• <a href="#">Understanding Census</a> video</li> </ul>

## Student Information

Done	Task	Notes
	Review student <b>Enrollment Records</b> for the current school year, checking for the correct start date (first day of school) and the correct start status.  Also, verify <b>Enrollment Records</b> 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 those that do require it, enrollments in past years that are not ended affect many reports and cause inaccurate counts.  See the following for more information: <ul style="list-style-type: none"> <li>• <a href="#">Enrollment Records</a> article</li> <li>• <a href="#">Enrollments</a> video</li> </ul>

Done	Task	Notes
	<p>Verify <b>lockers</b> used by last year's graduating seniors have been end dated and are available for reassignment.</p> <p>Verify that lockers have been assigned to <b>students</b>.</p>	<p>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.</p> <p>See the following for more information:</p> <ul style="list-style-type: none"> <li>• <a href="#">Locker Administration</a> article</li> <li>• <a href="#">Locker Batch End Wizard</a> article</li> <li>• <a href="#">Locker Setup And Management</a> video</li> <li>• <a href="#">Combination Rotation Wizard</a> article</li> <li>• <a href="#">Combination Rotation Wizard</a> video</li> </ul>
	<p>Run the <b>Student Gap Scheduler</b> to find empty periods in students' course schedules.</p>	<p>During the scheduling season in the spring, 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 there is still a need to hand schedule some students for some periods. The Student Gap Scheduler can fill those empty periods with a study hall or prep period.</p> <p>See the following for more information:</p> <ul style="list-style-type: none"> <li>• <a href="#">Student Gap Scheduler</a> article</li> <li>• <a href="#">Student Gap Scheduler</a> video</li> </ul>
	<p>Ensure <b>Transcripts</b> are up-to-date through the end of the last school year.</p>	<p>The Post to Transcripts tool is used after final grades were entered by teachers after the end of the school year. Summer school grades may need to be posted as well.</p> <p>See the following for more information:</p> <ul style="list-style-type: none"> <li>• <a href="#">Transcripts</a> article</li> <li>• <a href="#">Transcripts</a> video</li> <li>• <a href="#">Post to Transcripts</a> article</li> <li>• <a href="#">Run Transcript Post</a> video</li> </ul>

## Course Information



Done	Task	Notes
	Verify the appropriate <b>Scheduling Board Trial</b> has been set to active.	<p>A Trial determines the placement of course sections and class rosters. Completion of the scheduling process may happen very close to the start of the year. Use the <a href="#">Scheduling Center</a> for tracking what still needs to be completed.</p> <p>See the following for more information:</p> <ul style="list-style-type: none"> <li>• <a href="#">Scheduling Board</a> article</li> <li>• <a href="#">Scheduling Center</a> article</li> <li>• <a href="#">Scheduling Center</a> video</li> </ul>
	Verify all <b>Courses</b> being taught for the current school year are active and have sections created and teachers are assigned to those sections.	<p>This task may have been addressed during the scheduling season during the spring.</p> <p>For any course that was added over the summer or for any school that creates courses regularly, do a spot check for the Active checkbox to be marked. Or, generate an ad hoc report to look for all active courses.</p> <p>See the following for more information:</p> <ul style="list-style-type: none"> <li>• <a href="#">Course Information</a> article</li> <li>• <a href="#">Course Information</a> video</li> </ul>
	Mark the <b>Attendance</b> checkbox on all courses that track attendance.	<p>This is the first thing to verify when a teacher says they can't take attendance.</p> <p>See the following for more information:</p> <ul style="list-style-type: none"> <li>• <a href="#">Course Information</a> article</li> <li>• <a href="#">Course Information</a> video</li> </ul>
	Ensure the <b>Sections</b> of the course are marked to meet in the correct period and term.	<p>Making changes to section placement (or any other course information) is NOT recommended after the start of school.</p> <p>See the following for more information:</p> <ul style="list-style-type: none"> <li>• <a href="#">Sections Information</a> article</li> <li>• <a href="#">Course Sections</a> video</li> </ul>

Done	Task	Notes
	<p>Make sure <b>Course Sections</b> have students scheduled on the first day of class.</p>	<p>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.</p> <p>See the following for more information:</p> <ul style="list-style-type: none"> <li>• <a href="#">Section Roster</a> article</li> <li>• <a href="#">Section Roster</a> video</li> </ul>
	<p>Verify <b>State Reporting Codes</b> have been entered on appropriate courses.</p>	<p>This may not be needed in your state. When it is, review the entered codes for accuracy, as some departments of education modify them over the summer.</p> <p>See the following for more information:</p> <ul style="list-style-type: none"> <li>• <a href="#">Course Information</a> article</li> <li>• <a href="#">Course Information</a> video</li> </ul>
	<p>Mark the <b>Lunch Count</b> and <b>Milk Count</b> checkboxes marked, if applicable, on Course Sections.</p>	<p>This option is mostly for elementary schools.</p> <p>See the following for more information:</p> <ul style="list-style-type: none"> <li>• <a href="#">Sections Information</a> article</li> <li>• <a href="#">Course Sections</a> video</li> </ul>
	<p>Verify <b>Grading Tasks</b> and <b>Standards</b> have been assigned to courses and the appropriate task/standard is marked for posting to the student's transcript.</p>	<p>Teachers cannot post grades without grading tasks.</p> <p>See the following for more information:</p> <ul style="list-style-type: none"> <li>• <a href="#">Grading Tasks</a> article</li> <li>• <a href="#">Course Grading Tasks</a> video</li> <li>• <a href="#">Standards</a> article</li> <li>• <a href="#">Course Standards</a> video</li> </ul>
	<p>Review the entered <b>GPA weight</b> for courses contributing to the student transcripts.</p>	<p>See the <a href="#">GPA Calculations in Campus</a> for additional guidance.</p>

Done	Task	Notes
	Ensure <b>Score Groups/Rubrics</b> and <b>Grading Scales</b> are accurate.	<p>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 a passing scores.</p> <p>See the following for more information:</p> <ul style="list-style-type: none"> <li>• <a href="#">Grading Scale Setup</a> article</li> <li>• <a href="#">Grading Scale Setup</a> video</li> <li>• <a href="#">Score Groups and Rubrics</a> article</li> <li>• <a href="#">Create Score Groups</a> video</li> <li>• <a href="#">Create Rubrics</a> video</li> </ul>

## Instruction

Done	Task	Notes
	Ensure teachers can view information for each of their assigned course sections.	N/A
	Verify teachers can take <b>attendance</b> for their courses.	<p>Teachers cannot take attendance until the first day of school, but make sure the Attendance checkbox is marked on the course editor and that the teacher checkbox is marked on the staff person's District Employment record and the teacher is assigned to the course section.</p> <p>See the following for more information:</p> <ul style="list-style-type: none"> <li>• <a href="#">Teacher Attendance</a></li> </ul>

## Fees

Done	Task	Notes
	Verify <b>Fees</b> have been created and assigned to students.	<p>See the following for more information:</p> <ul style="list-style-type: none"> <li>• <a href="#">Fees</a> article</li> <li>• <a href="#">Fees</a> video</li> <li>• <a href="#">Student Fees</a> article</li> <li>• <a href="#">Student Fees</a> video</li> </ul>

Done	Task	Notes
	Assign <b>Course Fees</b> to courses.	See the following for more information: <ul style="list-style-type: none"> <li>• <a href="#">Course Fees Assignment Wizard</a> article</li> <li>• <a href="#">Course Fees Assignment Wizard</a> video</li> </ul>
	Set Fee Maximums.	See the following for more information: <ul style="list-style-type: none"> <li>• <a href="#">Fee Maximums</a> article</li> <li>• <a href="#">Fee Maximums Setup</a> video</li> </ul>

## FRAM

Done	Task	Notes
	Review and make appropriate changes to FRAM Preferences.	See the following for more information: <ul style="list-style-type: none"> <li>• <a href="#">FRAM Preferences</a> article</li> <li>• <a href="#">FRAM Preferences</a> video</li> </ul>
	Create FRAM Letters.	See the following for more information: <ul style="list-style-type: none"> <li>• <a href="#">FRAM Letter Editor</a> article</li> <li>• <a href="#">FRAM Letter Editor</a> video</li> </ul>
	Create the FRAM Letter for Campus Parent use (if your district uses Online FRAM Applications).	See the following for more information: <ul style="list-style-type: none"> <li>• <a href="#">Online Application Letter Editor</a> article</li> <li>• <a href="#">Online Application Letter Editor</a> video</li> </ul>

## Food Service

Done	Task	Notes
	Perform a POS Data Load on every terminal.	See the following for more information: <ul style="list-style-type: none"> <li>• <a href="#">Terminal Installation and Configuration</a> article</li> </ul>
	Review the Summer Maintenance tasks for Food Service and revisit the End of School Year information.	See the following for more information: <ul style="list-style-type: none"> <li>• <a href="#">Summer Maintenance Tasks</a> video</li> <li>• <a href="#">End of School Year Process for Food Service</a> article</li> </ul>

## Activity Registration

Done	Task	Notes
	Roll forward your school's activities.	See the following for more information: <ul style="list-style-type: none"> <li>• <a href="#">Activity Roll Forward</a> article</li> <li>• <a href="#">Activity Roll Forward</a> video</li> </ul>

## School Store

Done	Task	Notes
	Create new product that are specific for the school year.	See the following for more information: <ul style="list-style-type: none"> <li>• <a href="#">General Product</a> article</li> <li>• <a href="#">General Product</a> video</li> </ul>
	For Campus Mobile Payments, verify the events (especially for the fall season) are created.	See the following for more information: <ul style="list-style-type: none"> <li>• <a href="#">Events</a> article</li> <li>• <a href="#">Events</a> video</li> </ul>

## 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!

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