

## Back to School Checklist

### PowerSchool

1. School/Years and terms
  - a. Verify years and terms to make sure all dates are correct
  - b. Tip: Make the Term End date the day before you go back to school For the next term.  
Example: End on Sunday and then Start New on Monday
2. [Final Grade/Reporting Term Setup-](#)
  - a. This screen creates terms in the teacher gradebooks
  - b. Check your previous year setup to see what terms you setup in the past.
  - c. Make dates match Years and Terms setup
  - d. This screen must be setup for Quick lookup to display Grades correctly
3. Copy Master Schedule-live side option
  - a. Schools wanting to copy section data from previous year should do so before creating calendar.
  - b. **Note:** When using the Copy Master Schedule function, PowerSchool will reinitialize your school calendar for the target year while copying sections from the source year into the target year. This reinitialization will clear any bell schedules and cycle days specified on the school calendar for the upcoming (target) school year. If your school is using the Copy Master Schedule function, it is recommended that your school does not setup the calendar until after copying the master schedule.
    - i. Navigate to System Administrator > Copy Master Schedule.
    - ii. Choose the prior school year as Source year.
    - iii. Choose the newly create year as the Target year.
    - iv. Check the confirm box.
    - v. Submit.
4. Review Bell Schedules
5. Update School/Current Grade Display and Quick Lookup Preferences
  - a. NOTE: These screens have changed in version 9
  - b. This screen now covers mobile apps and online without the extra tab that was easily forgotten

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This screen specifies which grades are seen on the Quick Lookup screen as well as on the summary screen parents see when they access their student's record through the internet.

| Store Code | Enabled Parent/Student              | Enabled Teacher                     | Enabled Admin                       | Source of Data        |
|------------|-------------------------------------|-------------------------------------|-------------------------------------|-----------------------|
| Q1         | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Gradebook (Current) ▾ |
| Q2         | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Gradebook (Current) ▾ |
| Q3         | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Gradebook (Current) ▾ |
| Q4         | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Gradebook (Current) ▾ |

## Current Grade Display - [REDACTED]

The Active Term is used for:

- Calculating the Quick Lookup GPA from Gradebook grades
- The default term for current Gradebook grades when a term is not specified

To modify which terms appear, go to [Quick Lookup Preferences](#).

Active Term

Q1

6. School/Calendar setup -
  - a. Schools that follow the standard Bell Schedule and Days can use the district calendar.
  - b. Also note that they have a new link Set up calendar days according to a pattern.
7. Update School/School information for NCEA reporting
8. Update Missing student information
  - a. Example search "gender=(leave Blank)" would find students missing that information
    - i. Ethnicity and Race for NCEA reporting
    - ii. Update Gender for NCEA reporting
    - iii. NCEA student information Screen
9. Verify enrollments
10. Powerschool Student and Parent portal setup
  - a. NEW School setup/Parent/student access
    - i. Schools can now turn on and off parts or all of the parent portal from this screen along with a message to parents when they log off
    - ii. Look at available features tab for additional options
  - b. Assign new students ids, passwords, and parent access keys
  - c. Enable student and parent access
  - d. Print web access form letters for parents These options are available
    - i. Universal Password Letter - With Lunch Info
    - ii. Universal Password Letter - Without Lunch Info
    - iii. Universal Password Letter- without student access.1
11. Teacher Schedules
  - a. Review sections
  - b. Send coursenumbers.sectionnumbers to the helpdesk for sections you want deleted.
  - c. Change teacher names for sections for new staff
  - d. Review Homeroom sections for dependent sections for Elementary schools before enrolling students
12. Staff updates
  - a. Update staff fields
    - i. title field with the job title or grade level taught for teachers and staff
    - ii. Ethnicity and Race for NCEA reporting
    - iii. Update Gender for NCEA reporting

- iv. Update e-mail fields
- v. Make staff inactive-never delete a school from teacher records
- vi. Disable teacher log-in access for retired staff
- vii. Submit admin staff changes to helpdesk
- viii. Update NCEA staff information Screens for all staff at your school
  - 1. Fields are school specific for staff at multiple locations
  - 2. Exclude support staff not counted in NCEA reporting

13. Scheduling students

- a. Determine Scheduling process at your school
  - i. Mass Enroll using homeroom and dependent sections
  - ii. <https://support.powerschool.com/training/2/mim.action?course.id=62>
  - iii. Individual scheduling
  - iv. Be mindful of start dates for sections when scheduling

14. PowerLunch now MBA Caf<sup>2</sup>

- a. Documentation for this software can be found by clicking on the MBA support link in the upper right hand corner of the screen below the school name
  - i. Select documentation for the Caf<sup>2</sup> Plugin

15. Support accounts

- a. Note new quick link to monthly videos from the start page in PowerSchool. No login is required to view these videos. **Please check them out.**