

Beginning of Year Checklist

06/29/2026 9:33 am EDT

Use this checklist as a guide to complete Beginning of Year processes.

Validate New School Year	
School Information	<input type="checkbox"/>
School Calendars	<input type="checkbox"/>
Term Setup	<input type="checkbox"/>
Period Setup	<input type="checkbox"/>
Day Setup	<input type="checkbox"/>
School Month Setup	<input type="checkbox"/>
Course Masters & Grading	
Course Master Information	<input type="checkbox"/>
Review and Process State Course Code Changes	<input type="checkbox"/>
Relink Courses to Course Masters	<input type="checkbox"/>
Audit Course Master Information	<input type="checkbox"/>
Course Master Grading	<input type="checkbox"/>
Audit Grading Tasks	<input type="checkbox"/>
Audit Standards Bank (if applicable)	<input type="checkbox"/>
Audit Grade Calc Options	<input type="checkbox"/>
Scheduling	

Master Schedule	<input type="checkbox"/>
Verify Section Information	<input type="checkbox"/>
Verify Section Staff	<input type="checkbox"/>
Inclusion & Pull-Out Sections (if applicable)	<input type="checkbox"/>
Cross-Site Setup (if applicable)	<input type="checkbox"/>
Student Schedules	<input type="checkbox"/>
Roster Students	<input type="checkbox"/>
Find Students with Gaps	<input type="checkbox"/>
Print Schedules	<input type="checkbox"/>
Student Information	
Clean Up Overlapping Enrollments	<input type="checkbox"/>
Verify Student Enrollments	<input type="checkbox"/>
Verify State Student Enrollments	<input type="checkbox"/>
Retention/Promotion Updates	<input type="checkbox"/>
Summer No Shows	<input type="checkbox"/>
Student Transfer Records	<input type="checkbox"/>
Student Activity Roll Forward (if applicable)	<input type="checkbox"/>
Audit Program Participation	<input type="checkbox"/>
Audit Student Flags	<input type="checkbox"/>
Census Information	
Verify Census Information	<input type="checkbox"/>
Census Data Validation	<input type="checkbox"/>
Staff Information	
Verify Employment and District Assignments	<input type="checkbox"/>

Update Staff Information	<input type="checkbox"/>
Add New Staff Records	<input type="checkbox"/>
End Date Staff Records (District Assignments & District Employment	<input type="checkbox"/>
Administrative Tasks	
Grading Window Setup	<input type="checkbox"/>
Update Reports	<input type="checkbox"/>
Restore Automated Tasks	<input type="checkbox"/>
Verify Attendance Codes	<input type="checkbox"/>
Workflow Roll Forward (if applicable)	<input type="checkbox"/>
Fees (if applicable)	<input type="checkbox"/>
End Summer School (if applicable)	
Add Transcript Records (if applicable)	<input type="checkbox"/>
Summer Education Program	<input type="checkbox"/>
Read to Achieve Program (if applicable)	<input type="checkbox"/>
Close out Summer School	<input type="checkbox"/>
Access Management	
Calendar Group School Year Update	<input type="checkbox"/>
User Group Updates	<input type="checkbox"/>
Restore User Accounts	<input type="checkbox"/>

NCSIS Knowledgebase | Article: Beginning of Year Checklist | Last Updated: 06/29/2026 9:33 am EDT