**Checklist and Timeline – New Mobile Schools**

**January - March**

* Sign and send in agreement.
* If you have previous year’s directory in excel format, send to us and we will import for you. You can also wait until the Fall and get us new data at that time

**April – June**

* Consider adding a link to your school’s website to promote the app for easier parent access.
* Ensure that you find a directory chair that will manage the directory process. Our software has lots of contextual help to assist you through the software. You can also watch our training videos that show you the different modules.
* Capture and input in database the names & email addresses for incoming kindergartners and new families. **Don’t miss K orientation!**
	+ **For incoming Kindergartners (or youngest grade), leave them unassigned to a grade in order to separate new students from existing students in database.**
	+ Note: Once you enter data it is “live,” and can be viewed in the app.

**July – August**

* AtoZ will promote your students to the next grade if you provided us data from the previous year. We will also give everyone access to the App through 8/31 of next year.
* Determine if you will be using our software to track/collect PTA membership. Make sure proper products are established for PTA/PTO memberships, etc.
* Update the default email under Email From List.
* Attend new student orientation to get new family data, and add new students and transfers into system if they were not added earlier.
	+ If you have a large number of new families, contact us about doing another import. You can also get us a complete new data file of your families from your school if that is easier.
* Update teacher names in system under School Information.
* Send out email to people in database to have them verify their data via the Parent Verification Wizard.
* You may want to hide the teacher field under Basic Settings if the class assignments are not available

**September – October**

* Continue to add new students. Get updated class lists from school to compare to your data in the database.
* Assign teachers to students in system as final verification of data to ensure data is complete.
	+ Be sure to unhide Teacher field in Basic Settings if you previously had it hidden.
* Promote School Directory App as a great new tool for all PTA members – show powerpoint presentation at Back to School Night.
* Contact parents again via email/backpack express to get them to confirm their data. You should do this 3-4 times at a minimum to make sure parents respond.
	+ Software can also generate form letters that you can send home via “backpack express” to help parents verify their data.
	+ Stress to parents that this is their ***last chance*** to ensure their data is accurate for the print directory.
* Carefully review Cleanup section of software to ensure your data is accurate.
* Double check data for potential problem areas like multiple households & opt outs. (See [**Checklist for Finalizing School Data**](https://atozdirectories.box.com/s/05wj0d7obkxnyov7o2het9nxsyn1uv0l)).
* If you create a print directory, inform AtoZ that your data is final and ready to go to print. Check AtoZ’s website for [sample reports](http://www.atozdirectories.com/school-reports/) to choose your desired layouts, and ask us to send you your selected class rosters and student listings. AtoZ does not print your directory but we provide you the class rosters and student listings you can use for your print directory.
* Celebrate completion of your directory!!

**November – December**

* Turn off Verification Wizard.
* If choosing to give app access to only parent group members, turn off access to the Mobile Directory for non-parent group members under Families – Manage Households.

Questions? Check out our [support site](http://atozdirectories-school-admins.helpscoutdocs.com/).