**Checklist and Timeline – Returning Premium Schools**

**January**

* Sign agreement

**February – June**

* Ensure that the incoming directory chair has all necessary training materials. Remember the current Admin can create new/additional software Admins. 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), assign them to “incoming K” or a similar grade to separate new students from existing students in database.**
* Send out “advertising announcement” (will be sent to you in April) via email/newsletter/ backpack express letting parents know they can advertise in the directory.

**July – August**

* Determine if you will be using our software to track/collect PTA membership. Make sure proper products are established for PTA/PTO memberships, etc.
* Send us a list of community businesses you think would make ideal school sponsors/advertisers.
* AtoZ will promote/graduate all students in database and clear teacher assignments. We will also give everyone access to the App through 8/31 of next year.
* Update the default email under Email From List.
* Send out the 3rd “advertising announcement” via email/newsletter/ backpack express letting folks know they can advertise in directory.
* 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.
* **Finalize any school info to include in the directory (i.e. calendars, officers, etc.) using** [**AtoZ’s template**](https://atozdirectories.box.com/shared/static/8b1ae7sswpu1sv2eg1bra6q27qzao4p2.docx) **or last year’s document.**
* Send out email to people in database to have them verify their data via the Parent Verification Wizard. Before sending the email to all parents, make sure to go through the process yourself (and 2-3 friends also) to make sure it is working as expected.
* You may want to hide the teacher field under Basic Settings if the class assignments are not available

**September – October**

* Send out final “advertising announcement” via email/newsletter/ backpack express.
* 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.
* Promote School Directory App as a great/free new tool for all PTA members – show PPT 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)).
* Send AtoZ Directories fully proofed, properly formatted calendars, teacher listings, school information, etc. (using [AtoZ’s template](https://atozdirectories.box.com/shared/static/8b1ae7sswpu1sv2eg1bra6q27qzao4p2.docx))
* Confirm directory order information such as quantity, date needed, and delivery address with AtoZ Directories as per [**Checklist for Finalizing School Data**](https://atozdirectories.box.com/s/05wj0d7obkxnyov7o2het9nxsyn1uv0l)
* 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/).