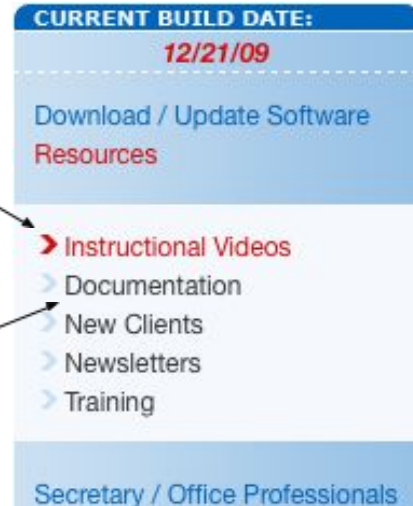


## Starting the 2019-2020 School Year Checklist – New Client

The following is a list of items to be completed before school starts or shortly thereafter. The items listed do not need to be completed if your school does not use that particular module or function, nor do they need to be completed sequentially.

### **General**

- Every JMC user should familiarize themselves with the resources available at our website: [www.JMCINC.com](http://www.JMCINC.com).
- View JMC instructional videos, found under the Resources tab on the JMC website, and present them to the appropriate staff.
- Review the documentation available and download the necessary forms. Please note: These forms do not need to be printed; they can be viewed as PDFs on your desktop.
- All office users should visit the “New Clients” section of the JMC website. This gives new users a general overview of the program and explains the different resources that are available to them.
- Every JMC user should understand that they can call JMC tech support (1.800.524.8182 x1) with questions they have. You are able to talk to a live person or leave a message and a tech support professional will call you back.



**The best way to start the school year is to attend a Summer Regional Training.** We will go through this checklist at that training and you can make sure you start the school year off with the most up-to-date training. Please consider joining us at one of the trainings below and if you are a brand new school to JMC you get to attend for free! Email us with the name and email address of any administrator and office professional who will be attending.

**Monday July 29th - Ankeny IA**

**Tuesday August 6th - Twin Cities, MN**

**Monday August 5th - Altoona WI (Wisconsin Schools Only)**

**Wednesday July 24th - Norfolk NE (Nebraska Schools Only)**

## **JMC Modules**

Please note: Items that can only be done at the district level will have the *(district level)* notation.

### **Attendance**

- Any students who have enrolled in or transferred out of our school since your 19-20 data was transferred to JMC must have their demographic data entered or adjusted. Use Edit►New Student Wizard to put new students in.
- Office personnel should be given JMC usernames and passwords with the appropriate user privileges in File►Application Security
- New teachers should be entered (and given usernames and passwords for the Gradebook if applicable) in Attendance►Staff►Teachers. Outgoing teachers who have been replaced should have the new teacher's name entered in place of the outgoing teacher's name. This puts the new teacher's name in the Course Data for easier scheduling. Make sure to check the "Building Access" flag for each building in which they will be teaching. When you do this, it will ask you if this is the "Same Teacher, New Teacher, or Existing Teacher from last year." Choose "New Teacher," then click "OK" and "Update".
- Assign advisors en masse for students in Attendance►Staff►Assign Advisees or assign them individually on the Edit►Student Data screen. Advisors are typically a student's main teacher in the elementary school and her/his homeroom teacher in the middle school and high school.
- Update the "Comments" tab and "Spec Ed" tabs with information teachers will see in their JMC Online Teacher program. You can also update the confidential comments at this time.
- Print student information for advisors in Attendance►Staff►Advisor List.  
- This is an important step! It is good for all homeroom teachers to have one of these for the first day of school in case you have any issues with technology. This handy sheet of paper can be used to mark attendance, lunch counts, etc. Put a note in your calendar to print one of these for each teacher the day before school starts.
- (Optional) Assign locker numbers and combinations in Edit►Student Data.
- Substitute teachers should be entered in Attendance►Staff►Substitutes. If you then "Add Record" at the bottom, the substitute teacher entered can take attendance for the teacher for which they are subbing-for the date/time set.
- Create new Custom Field definitions for the current year in File►Define Custom Fields. Place a checkmark under the "Current year" column for those custom fields you wish to use for this year. (You will need the JMC Administrator Password to view this screen.)
- Create Student Information Forms using the Form Designer. These forms can be printed so parents can review student demographic information and parent contact information. (For more information, view the instructional video "Student Information Forms.")
- If Lifetouch, Herff Jones, or Jostens are used for school pictures, create the information file for those businesses in Attendance►Student►Lists. A new report has been created for you called "Student Photo File." Highlight the "Student

Photo File,” click “OK,” click “Preview” near the bottom, and then click “Export Data” to create the file you will email to your photo company.

- School days in session must be entered in (*district level*) Attendance►Day►Day Names. We now recommend that you enter in every day (Monday – Friday) from the first day of school to the last day of school and then go into each building and “Edit” the days with no student contact as “No School” for all grade levels at one time. This is done on Attendance►Day►Day Names. This will take you a bit of time but in the event that you have a large number of snow days you will easily be able to make one of those days a student contact day.
- Change the graduation date for an entire graduating grade level in (*district level*) Edit►Mass Change Fields. Review all of the fields that can be changed en masse.
- The system administrator should go to File► Administrator Options. (You will need the JMC Administrator Password to view this screen.) This screen allows you to:
  - a. Set the number of periods in a day and days in a cycle.
  - b. Set up emailing through JMC.
  - c. Set scheduling sorting by Sem or Tri.
  - d. Set up the Message Center.
- Think about how you would like students numbered (Student ID) in the JMC program. Many schools use the JMC student number as their lunch identification. Students are assigned student numbers when they are put into JMC after we import your data by looking at the lowest student number in a grade level in the district and then giving the new student the next student number. For example, if a 9th grader has student number 1427, and a new 9th grader enrolls, he will be given number 1428 if that is open or it will go through the list to the next open number. If you would like to change student #'s, go to Edit►Renumber Students. The most common practice is to put a student’s graduation year followed by 2-3 numbers depending on the enrollment in each class (ie. 1301, 1302, etc..). It is important to figure out your numbering system early as once the school year starts it can create a lot more work for the office to tell every student their new student number.
- Many states have an Edit►Edit School Data menu item. If your state does, review the information needed there.
- Check to make sure all flags (Active, Attend, State Reporting, Rank, Honor Roll) are correctly checked for students by going to Attendance►Student►Exceptions.
- Enter the end of term dates (only for the terms you use) in Attendance: Calendar►Term Dates.

### **Online Modules**

- Review Online Access settings in File►Online Settings. This screen allows you to determine how different Online Modules are used.
- A new feature (*district level*) has been added where a message can be displayed for parents in Parent Access but this can only be edited in the district building Online Access screen.

- ❑ Online Student Registration – Parents can complete some of the registration process online (at school or at home) to reduce paper use and save the office team time.
- ❑ Parent Alerts: This feature allows parents to receive an email if the student is absent, tardy, missing an assignment, or failing. To turn this feature on you must put a “Reply to Email Address.” It is recommended that you delay Attendance Alerts at least 30-90 minutes and check the “Limit Grade/Missing Score Alerts (Once Per Day)” box.
- ❑ Create new Student Portal usernames and passwords en masse in File: Administrator Options and click on “Set random student and parent passwords.” We recommend using the button below:

**This option will set a username and a password for all students that currently do not have them.**

**Initialize Student Usernames and Passwords**

This auto-assigns their username (first initial+last name) and a very random password. The password is so random that 4 characters is all that is needed. If you want to assign usernames and passwords individually, see the next item.

- ❑ Assign usernames and passwords for all new students in Edit► Student Data► General (Tab). This tab is on the lower portion of the screen.

### **New (to your school/district) Online Family Enrollment**

If you would like to allow families that are new to your school/district enter information online that you can “pull” into JMC you must first go to (*District Level*) File► Online Settings and click the box to turn this feature on. You can then send them the New Family Enrollment link to collect their information.

### **Message Center (Voice and Text Messaging Option)**

**Important Note:** You will only be able to send voice and text messages to contacts of the students in the building you are logged into, ie. if you are logged into the elem building only the parents of elem students will get the message. If you want to send a message to all parents in the district, make sure you are logged into your District Building.

- ❑ If you are new to the message center, please copy the link below into a web browser to get an overview of the message center.  
<https://www.youtube.com/watch?v=eTN56q-RhDk&t=1s>
- ❑ Test the message center by sending a voice and text message to a few parents in your school that you know. This ensures that you have set up the message center correctly.
- ❑ Go to File► Administrator Options in the “Phone Settings” box at the bottom of that page. This is the spot where you can:
  - Set up “Phone Dialer Settings” – These are settings for the basic functionality of the Message Center.

- “Initialize Contact Phone Numbers” – This is a way to choose cell phones to receive text messages and slot 1 phones to receive voice messages.

## Activities

- Add/Update coach/advisor information in Activities►Edit Activity Coach/Advisor for anyone who is an advisor/coach of a sport or extra curricular activity. Then go to Activities►Edit Activity Defs and enter the updated activity information making sure to attach the correct coach/advisor to activities. After this is done, instruct your coaches/advisors to download and use the new JMC Coach/Activity app.
- Import (New for 19-20) and/or enter rosters for activities in Activities►Edit Activity Rosters. Please note that coaches/advisors can add their own rosters in the new JMC Coach/Activity app.

## Schedules

- If your schedule for the current year is not complete or you need more instruction on the Scheduling process, go to the link below to download the appropriate instructions.

### High School Scheduling

[http://jmcinc.com/uploads/files/Six\\_Stages\\_JMC\\_Scheduling.pdf](http://jmcinc.com/uploads/files/Six_Stages_JMC_Scheduling.pdf)

### Elementary Scheduling

[http://jmcinc.com/uploads/files/Elem\\_MS%20Schedule.pdf](http://jmcinc.com/uploads/files/Elem_MS%20Schedule.pdf)

- All student schedules should be completed before the on-site training in August/September.
- If all mass scheduling is completed for the school year, schedules should be “locked” in Schedules►Develop►Locking Options. The access code is the school’s postal area code. Students can then have schedules altered individually but the “Schedule Students” function is disabled.

## Grading

- Review/Edit the course grades and weights in Grading►Utilities►Edit Grade Values. Make sure the regular grading scale is correct and add any course grades that may not be on the list.
- Review/Edit the list of available comments from which teachers choose for printing on report cards in Grading►Utilities►Edit Comments. You have 99 comment spaces to use. Each teacher can choose one comment per course per grading term.
- Decide how you will send out report cards. JMC now offers emailed report cards for report cards, custom report cards, mid-term report cards, and standards and benchmarks (elem) report cards. This can be a time and money saver for your district.

- Choose Standardized Test Scores to be seen “On Screen” and “On Transcripts” in Grading► Transcripts► Test Score Selections. The “On Screen” settings are saved for each user.

### **Period Attendance**

- Anyone who is recording daily attendance in the office should view the “Intro to Period Attendance – Next-Gen” instructional video via the link below.  
<https://www.youtube.com/watch?v=GWRpPsSRMAI>
- Review the reasons for students’ absences and cutoffs for full/half day attendance in Period Attendance► Data► Edit Reasons and Cutoffs. Add or delete reasons as is necessary and review all checkmarks in the “Include in conversion” column.

### **Standards and Benchmarks – Elementary Report Cards**

- The Standards and Benchmarks module is typically used for elementary (K-5) report cards. Please contact Sara Freid at JMC (sara@jmcinc.com) to get the process started if you are interested in utilizing elementary report cards through JMC. This should be done prior to June 15<sup>th</sup>.

### **Health**

- We recommend that all Health Professionals view the “Introduction to the Health Module” instructional video.
- Review and add/remove Health History Categories in Health► Data► Health History Categories. The Health History Categories settings are saved for each user.
- Review Health History items you allow parents and/or teachers to see in Health► Health History► Health Accessibility. If you have never used this screen, refer to the Quick Link video on the right side of this screen.
- Enter Medical Emergency Plans by going to each student in Health► Medical Emergency Plan► Edit Student Medical Emergency Plan and click the “Share with Teachers” button.
- Enter all student medications in Health► Medication Log► Edit Student Medication Log.

### **Lunch Module**

- Please view the “Next-Gen Lunch Parts One - Four” instructional videos. Follow the instructions given in the videos.
- If you use Family Lunch Accounts, create lunch contacts for all new students using Lunch► Data► Initialize Family Lunch Contacts. This should not be done until all primary contacts have been entered in the Attendance module and attached to each student.
- Adjust lunch contacts for any students who have lunch contacts that are different than their primary contact in Edit► Student Data.
- Enter meal prices and (optional) the state and federal reimbursements in Lunch► Data► Edit Meal Prices.

- New Teachers/Office/Administrator/Staff should have a lunch account created for them. This is done by creating each of them as a new student (in Edit► Student Data) and making their grade level “Adult,” which means they are recorded as an adult. You will need to choose a price group from the pop-up menu. (It usually doesn’t matter which price group you choose because adults typically pay the same price no matter what price group they are in). Uncheck their Attend, State Reporting, Rank, and Honor Roll flags/boxes in the General tab. You can leave the Active flag/box checked or uncheck it. Since adults are in their own grade level, many schools will leave it checked so they can print labels, send emails, run reports, etc. for the adults entered in JMC. You can also only see/edit adults by choosing the “Adult” grade level in the pop-up menu on the top right corner of the screen.

### **Free and Reduced**

- For all parents/guardians who applied for free or reduced status, determine free and reduced status in Lunch► Free/Reduced► Determine Free or Reduced Status.
- Import “Direct Certification Files” from the state department of education to import into JMC in Lunch► Free/Reduced► Direct Certification Import.
- Print Direct Certification response letter (required) in Lunch► Free/Reduced► Direct Certification Notification Letter.

### **POS**

- Please show the “Next-Gen Lunch Part Three - Point of Sale” instructional video to all new users of the POS.
- Enter usernames and passwords for all new professionals working with the POS in File► User Privileges.
- In the POS application loaded onto your “lunchroom” computer, review POS preferences in File► Preferences.

### **Online Payments** (Credit card and ACH payments for food service and fees directly into JMC)

- Review online payment setup in Online Payments► Online Payment Setting

### **GradeBook**

- Teachers do not need to do anything with the GradeBook before training in August/September.

### **Message Center**

- JMC has the ability to send out voice/text messages. One way to set up groups to send voice/text messages to is by grouping them together in Activities. Review the Activities you have set up in Attendance► Activities► Edit Activity Defs.

## **State Reporting**

### **Minnesota/MARSS**

- We encourage all MARSS reporters to check out the State Reporting page on our website at <http://www.jmcinc.com/state-reporting>. Click on the Minnesota tab to see the resources available to you.

### **Iowa/EASIER**

- We encourage all SRI reporters to check out the State Reporting page on our website at <http://www.jmcinc.com/state-reporting>. Click on the Iowa tab to see the resources available to you.

### **Wisconsin WSL/ISES**

- We encourage all WSL/ISES reporters to check out the State Reporting page on our website at <http://www.jmcinc.com/state-reporting>. Click on the Wisconsin tab to see the resources available to you.

### **Nebraska NSSRS**

- We encourage all NSSRS reporters to check out the State Reporting page on our website at <http://www.jmcinc.com/state-reporting>. Click on the Nebraska tab to see the resources available to you.