



New School Set Up Checklist

Now that you have received your training, you will next need to access your ScholarPack portal to set up your school details and configure settings, before then going on to provide the rest of your staff with their credentials ready to use ScholarPack as your School's new MIS!

Please use our 'First Time ScholarPack Set Up' guide for steps on how to set up your school on ScholarPack; the link to this guide should have already been sent to you, however, this can also be found by signing into your ScholarPack portal and selecting **Documentation>Training and Onboarding>Setting Up My New MIS>First Time ScholarPack Set Up**. To help you complete these steps, please use the below checklist!

Checklist:

Initial Access:

- Received welcome email from ScholarPack containing URL, guide links and username.
- Received phone call from ScholarPack to provide temporary password.

Once you have signed in to ScholarPack please ensure to change your password to something of your choosing by going to **Home>My Password**.

Core Set Up:

- Entered all the school details within the 'School' section.
- Entered your school holidays within the 'Holidays' section.
- Removed/added the relevant school years within the 'Years' section.
- Removed/added the relevant school forms within the 'Forms' section and organised them into the correct order.

Configuration:

- Configured the Teacher's register with your required set up.
- Assigned Tutors to their Year/Forms.
- Reviewed 'Security Settings' and changed if required.

Attendance and Student Checks:

- Checked for gaps within your attendance.
- Confirmed correct number of students on-roll.
- Confirmed correct number of active staff members.

Staff Credentials and Roles:

- Downloaded staff credentials file from 'Secure Upload' area.
- Assigned access roles to staff members.
- Print off staff credentials.
- Distribute staff credentials.

API Configuration (if applicable):

- Configure any links you have with 3rd party integrators (such as parent payment, safeguarding and assessment systems).

If you are unsure what is required for your API integration we also have a guide to assist with this which is linked within the 'First Time ScholarPack Set Up' article you are referencing, however, we do always recommend that you contact the provider of the system you are wishing to integrate.

You are now ready to start using ScholarPack as your School's new MIS!

