

READYING YOUR UNIT FOR THE UPCOMING YEAR

Getting you and your unit/school ready for the upcoming year is a simple task. If you are the current admin and are staying on or handing the administration of the system to another officer in your unit you will want to complete this task prior to the expiration of your term. Invite your new administrator to join you as you perform the operation. This will give them a look at the system from your perspective.

Here is a list of tasks to perform from the Administrator Dashboard in Just Between Friends to prepare for the upcoming school year.

| | Task | Why? |
|--------------------------|---|---|
| <input type="checkbox"/> | Are you staying on to manage the Just Between Friends next year? Extend your permissions in the system before your office expires | PTA permissions expire with the office so extend them now to guarantee a continuation of permissions |
| <input type="checkbox"/> | Add any new offices, as needed, to your list in the system under "Set Up Officers" link on the Administrator's Dashboard | So you can set up the appropriate admins to have PTA permissions as needed for next year |
| <input type="checkbox"/> | Add any new people to the appropriate office (they must be in the system & made members first) | Here you will be able to assign control of the system to new officers |
| <input type="checkbox"/> | Add, modify and delete any groups as needed. You may also consider making an alumni group so to keep track of graduating students. | An alumni group will let you keep in contact with your alumni for things such as reunions and get-togethers |
| <input type="checkbox"/> | Graduate your students to their new grade starting with top grade graduating into an alumni group and then working backwards by grade | Graduating students from all classrooms and grades into the next level will make communication over the summer a breeze and begin the process for creating a directory if desired |
| <input type="checkbox"/> | Run reports showing the current status of your unit in the system, including: Community Roster and PTA Roster | This will tell the new administrators where they stand in the system as far as members and other individuals currently listed in the system. |
| <input type="checkbox"/> | Modify your invitation code to reflect group changes | |
| <input type="checkbox"/> | Send a notice to your unit with an invitation code asking them to update their accounts in preparation for the new school year | By sending a closing communication with your invitation code you start your members on the path to updating their own information |