

Back-to-School Readiness Checklist



Use this checklist each summer to ensure your ROI platform is accurate, up to date, and set up for a strong school year. Work through each section with your team and CSM before the first day of school.

Update User Lists

- ☐ Add all new staff who need ROI access for 26-27
- ☐ Update roles or permissions for staff whose responsibilities change
- ☐ Remove users who have left the district or no longer need access
- ☐ Confirm building/school assignments are accurate for all users

Review Program Changes

- ☐ Identify, programs no longer in use - remove or archive in ROI
- ☐ Add any new programs or digital tools adopted for 26-27
- ☐ Verify all active programs are correctly categorized (core, supplemental, intervention)
- ☐ Update grade level and subject mappings for each program

Update Program Costs for 26-27

- ☐ Enter updated contract/license cost for each program (e.g., i-Ready, Lexia, Newsela)
- ☐ Note any cost-per-student changes from last year
- ☐ Record funding source for each program (General, Title I, IDEA, etc.)
- ☐ Flag any programs pending renewal or budget approval

Secure Back-to-School Training

- ☐ Secure virtual or in-person ROI training session with your CSM
- ☐ Identify new staff who need onboarding vs. refresher training
- ☐ Share training calendar with building leads and department heads
- ☐ Confirm training covers any new features or platform updates

Notify Your CSM of SIS or Benchmark Changes

- ☐ Switching or upgrading your SIS (e.g., Powerschool → Infinite Campus)? Alert your CSM early so integrations are remapped before school starts.
- ☐ Updated testing windows or assessment calendars for 26-27? Share the new schedule with your CSM.
- ☐ Changed benchmark assessment provider or added a new one (e.g., NWEA MAP, i-Ready Diagnostics, Star)? Confirm data feeds are updated.
- ☐ Any changes to student data fields, grade configurations, or roster imports that could affect ROI reporting