Directions: Share this Google Sheet with your district ParentSquare Team | Check off items in each section as you go!

School Admin Checklist | Customize Your Account & School

CUSTOMIZE YOUR ACCOUNT | Estimated Time: 20 min

FALSE	**Register your ParentSquare account at parentsquare.com/signin** using your staff email address or click on the link in your invitation email.
FALSE	**Check out this 8-min video** for an overview of navigating ParentSquare and **this 3-min video** on getting help with ParentSquare.
FALSE	**Add a photo** to your ParentSquare profile and your bio to "Edit Account > About You" to introduce yourself to families.
FALSE	Set **your preferences** for receiving Posts and Alert notifications and **your Office Hours** for direct messages.
FALSE	Install the ParentSquare app (**iOS** or **Android**) on your own device (optional but recommended).
FALSE	**Set up your Virtual Phone**. *(If it's available in your school/district).*

CUSTOMIZE YOUR SCHOOL ACCCOUNT | Estimated Time: 60 min

FALSE	**Add your school's logo and color theme** to ParentSquare.
FALSE	**Add your school calendar** to ParentSquare.
FALSE	Add **quick links**, **files** or **photos** to ParentSquare (think parent handouts, lunch menu, LMS and Parent Portal links, etc.)
FALSE	View your **School Directory** and **add applicable departments**. This will allow Admins to **"post as" departments**.
FALSE	Check your **school's data** in ParentSquare and add any users onto **the non-syncing list,** if needed.
FALSE	Check **user permissions and assign roles**.
FALSE	Review your Settings and Add-ons in the Add-ons tab (**Social/Web Share**, **Language Translation**, **Directory**, **User Accounts**, etc). (*Please note: your District Admins who implemented ParentSquare have selected the default settings. We recommend reaching out to your District Admins before adjusting defaults.*)

Next Steps: Launch PSQ To Your School

School Admin Checklist | Launch ParentSquare To Your School *(Coordinate w*

LAUNCHING PSQ TO YOUR SCHOOL | Estimated Time: 60 min

FALSE	Visit the **ParentSquare launch kit** for resources to help you streamline launch activities, including templates for different announcements as well handouts for downloading the app and onboarding your community.
FALSE	Send an **Introduction Letter** to Teachers and Staff.
FALSE	**Invite Teachers and Staff** to register their ParentSquare accounts.
FALSE	Reserve time for teachers to complete ParentSquare teacher training. Use either our live virtual or on-demand trainings available on **the ParentSquare Training Hub**, or our train the trainer materials **here**. (*If using the on-demand training module, we recommend also holding a live PD session for Q&A.*) Here's a **school training log** to track progress.
FALSE	Post a **Welcome Message in ParentSquare** for Families. (*Hint: Schedule this post as "do not notify" if you want the first notification your parents receive to be the official invitation, as shown in the next step. Then, this welcome message will already be in their post feed when parents log in for the first time.*)
FALSE	**Invite Parents** to register their ParentSquare accounts.
FALSE	Encourage parents to **download the app**. (H*int: do this with a ParentSquare post!*)
FALSE	Provide **additional resources** to parents. (H*int: send these communications out as ParentSquare posts & view* ***your post's delivery stats*** *to see who is receiving your communication along with who is viewing the message!*)
FALSE	*Suggestion* : Create a ParentSquare page on your district/school website with info introducing ParentSquare, how users can register their account & download the app, and other helpful FAQs. See the **launch kit** for resources for updating your website, including **sample text and graphics**.

Next Steps: Diving Deeper into PSQ

School Admin Checklist | Diving Deeper into ParentSquare

EXPAND YOUR PSQ SCHOOL ADMIN KNOWLEDGE | Estimated Time: 2 hours	
FALSE	Attend **a live Skill Up webinar** (or watch **the recording**).
FALSE	Attend **a live Advanced for Admin webinar** (or watch **the recording**).
FALSE	Familiarize yourself with these **help articles for School Admin** (see left side - Table of Contents).
FALSE	Familarize yourself with the **ParentSquare Features** (*hint: print the chart out for easy reference*).
CONFIGURE ADDITIONAL SCHOOL ADMIN SETTINGS | Estimated Time: 15 min	
FALSE	Enable the **School Contact Form**.
FALSE	Set up **Sync Failure Reports**.
FALSE	Set up **Contact Verification Reports** & learn how to **Reach 100% Contactability**.
Next Steps: Enhance Your School's Family Engagement	

School Admin Checklist | Enhance Your School's Family Engagement

TAKE FAMILY ENGAGEMENT TO THE NEXT LEVEL | Estimated Time: 2 hours

FALSE	Attend **a live Create & Connect webinar** to learn best practices for creating a repository of ParentSquare templates (or watch **the recording**.)
FALSE	Create a **library of Smart Alerts** and watch **this 3-min video** on how to send an alert from your phone's ParentSquare app, so that you're ready for anything!
FALSE	Create **Auto Notice**, **Forms/Permissions**, **Newsletter/Post** and **Secure Document Delivery** templates, as needed
FALSE	Set up **a PTA group** in ParentSquare and invite members.
FALSE	Check out **ParentSquare's Blog** - this is a great one to start with: **Best Practice for Reaching 100% of Your Fami**
FALSE	Check out **ParentSquare webinars**, monthly **What's New Review webinars**, and **Special Topic webinars**.
FALSE	Join **the ParentSquare Educator User Group on Facebook** for more tips and tricks!

MONITOR SUCCESS FOR YOUR COMMUNITY | Estimated Time: 15 min

FALSE	Gather feedback on effective training, rollout, and overall perception of ParentSquare by staff and teachers.
FALSE	Schedule a recurring monthly calendar event with your school leadership team to review the ParentSquare data dashboard.
FALSE	Check out how your school is using ParentSquare! See: **Admin Dashboard**, **Notifications Activity Dashboard**, and **Weekly School Admin Report**
FALSE	**Have a great success story?** The ParentSquare team would love to hear it! You can share your experience at **support@parentsquare.com**.

Looking for more inspiration? **Join us at a PSQ Summit for more opportunities to learn and network!**

School Admin Checklist | Virtual Phone Set Up

Estimated Time: 15 min

FALSE	What is Virtual Phone? Learn more in this **2-page overview** & **help article**.
FALSE	Ensure you have **verified your cell phone number** in ParentSquare. You'll receive a virtual number to mask your caller ID.
FALSE	Set your **Office Hours**. Calls to your virtual phone number that are placed outside of your office hours will go to voicemail.
FALSE	Set up your **voicemail message**.
FALSE	Learn how to **make a call with virtual phone** from the web or mobile app.
FALSE	**Block any phone numbers**, if needed. (Since the virtual phone number is a live number, spam calls may occur.)
FALSE	**View Call Logs and Reports** for Virtual Phone

Any other questions? Check out our Virtual Phone FAQ page !