

Admin Checklist

Use this checklist to wrap up the school year and ensure a smooth start to next year.

PLATFORM TASKS

1

Instruct providers on reports to download & print

Direct your providers to download and print any required reports for student folders or files.

2

Deactivate departing staff

Remove access for any staff members who will not be returning next school year.

3

Clear old Student Lists

Archive or delete outdated student groupings and lists that are no longer needed.

4

Delete old templates

Remove any outdated or unused note templates from the system.

5

Archive unlinked students

Identify and archive any students who are no longer linked to an active provider.

6

Inform Brolly of IEP system changes

Notify the Brolly team of any updates or changes made to your IEP system.

7

Inform Brolly of user or student number changes

Let Brolly know about any changes to the number of users or students for the upcoming year.

Questions? Reach out to your customer success team for support.

Contact us before school ends to ensure a smooth transition into next year.