School Directory Public School Task Checklist

This checklist has been provided for your convenience as you go through the many steps of making your annual School Directory updates. Use this digitally by saving it to your computer or cloud, or you can print it to mark things off with a pen/cil. It is recommended that you refer to the [School Directory Management Portal User Guide](https://dpi.wi.gov/cst/school-directory/updates/user-guides) for your local education agency type while you use this checklist to go through all of the required annual updates. [You can also refer to the School Directory: Annual Required Updates page](https://dpi.wi.gov/cst/school-directory/updates). Use the [School Modification Form](https://dpi.wi.gov/cst/school-directory/school-mod-form) ONLY IF you need to open a new school or close a school.

# Home Screen:

## To Manage:

[ ] Pay attention to the “Manage” icon throughout this user guide.

[ ]  Start by updating the Basic Information tile/screen.

If you reviewed information in a previous session but did not submit, you will see an hourglass icon indicating the date on which you last updated information. It will be next to the Submit Review button. DO NOT CLICK the “Submit Review” button UNTIL ALL DATA HAS BEEN REVIEWED!! It is the first item that appears on the Home screen and is the last item you should complete.

# Basic Information tile:

## To Manage:

1. [ ] Submit a  Customer Services Team Help Ticket if any of the following are incorrect on your screen:
	1. [ ] School District
	2. [ ] Legal Name
	3. [ ] Agency Type
	4. [ ] LEA Code
	5. [ ] CESA
	6. [ ] County
2. [ ] **Low Grade, High Grade:** Adjust low grade and high grade later, when you get to the Public Schools tile/screen.
3. [ ] **Educational Service (PK):** Select Yes or No, using radio button.
	1. PK is a federal requirement under FAPE (free appropriate public education) that must be offered by public schools/districts. All [elementary and combined schools](https://dpi.wi.gov/wise/data-elements/school-type) located in a public school district are required to provide PK services.
4. [ ] **Grades Offered:** Adjust grades offered later when you get to the Public Schools tile/screen.
5. [ ] **Click ‘Home’** from the breadcrumbs and move on to the **Address and Contact tile** on the Home screen.

# Address and Contact tile:

## To Manage: District Level Contacts and Addresses

1. [ ] Review the accuracy of your **district-level contact information**. This should be information for the district/central offices, or for the district administrator/district superintendent:
	1. [ ] Phone
	2. [ ] Fax
	3. [ ] Email
	4. [ ] Web address
2. [ ] **Review the accuracy of your addresses (physical, mailing, shipping).** Either click the buttons to make the mailing/shipping address the same as the mailing address or enter separate mailing/shipping address information.
3. [ ] **Save changes.**
4. [ ] **Click ‘Home’** from the breadcrumbs and move on to the **Staff Contacts tile**.

# Staff Contacts tile:

## To Manage: Update Mandatory and Other Contacts

1. [ ] **Review the accuracy of your mandatory contact information**. Mandatory contacts for a public school district include:
	* 1. [ ] District Administrator (also known as the District Superintendent)
		2. [ ] ESEA Coordinator
		3. [ ] Foster Care Point of Contact
		4. [ ] Guidance Counselor
		5. [ ] Homeless Liaison
		6. [ ] Special Education Point of Contact
		7. [ ] Technology Point of Contact
2. [ ] Click the purple edit icon to make changes.
3. [ ] Click the “+Add Contact” button to add any missing mandatory contacts or desired other contacts.
4. [ ] Confirm that everything appears accurately in the Staff Contacts tile for the Primary Contact Person:
	* 1. [ ] Title
		2. [ ] Name
5. [ ] **Click ‘Home’** from the breadcrumbs and move on to the **Kindergarten Schedule tile**.

# Kindergarten Schedule tile:

## To Manage: Kindergarten Schedules and Location

1. [ ] **Make your 4-Year-Old Kindergarten selection** from the list of options.
2. [ ] **Make your Program Setting Definition (Location of 4K Program) selection from** the list of options.
3. [ ] **Make your 5-year-Old Kindergarten selection** from the list of options.
4. [ ] **Save changes.**
5. [ ] **Click ‘Home’** from the breadcrumbs and move on to the **Public Schools tile**.

# Public Schools tile:

## To Manage: Schools Screen

Information on this screen and all sub-screens within the “Schools” breadcrumb need to provide **building-level information**. Each school must be updated one building at a time for the following:

* School Basic Information (Grades, PK Service, etc.)
* School Address
* School Contacts

**Select a school** from the listing, then move on to the **School Basic Information tile**.

##  To Manage: School Basic Information Screen

1. [ ] Submit a  [Customer Services Team Help Ticket](https://dpi.wi.gov/wisedata/help/request) if any of the following are incorrect on your screen:
	1. [ ] School District
	2. [ ] School Name
	3. [ ] Agency Type
	4. [ ] CESA
	5. [ ] County
	6. [ ] School Category
2. [ ] **School Type:** Select one choice from the dropdown menu.
3. [ ] **Virtual:** Select one choice from the dropdown menu.
4. [ ] **Low Grade, High Grade:** Adjust low grade and high grade.
5. [ ] **PK Educational Service:** Select Yes or No, using radio button.
	1. PK is a federal requirement under FAPE (free appropriate public education) that must be offered by public schools/districts. All [elementary and combined schools](https://dpi.wi.gov/wise/data-elements/school-type) located in a public school district are required to provide PK services.
6. [ ] **Grades Offered:** Adjust grades offered.
7. [ ] **Save changes.**
8. [ ] **Click the School Name** from the breadcrumbs and move on to the **Address tile** for the same school.

## To Manage: Update School Address

1. [ ] Review the accuracy of your **school building-level contact information**. This should be information for the building primary contact person (usually the building principal):
	1. [ ] Phone
	2. [ ] Fax
	3. [ ] Email
	4. [ ] Web address
2. [ ] **Review the accuracy of your addresses (physical, mailing, shipping).** Either click the buttons to make the mailing/shipping address/es the same as the mailing address or enter separate mailing/shipping address information.
3. [ ] **Save changes.**
4. [ ] **Click the School Name** from the breadcrumbs.
5. [ ]  Confirm that everything appears accurately in the Address tile:
	1. [ ]  Street address with zip code for physical address
	2. [ ]  School phone number
	3. [ ]  School fax number
	4. [ ]  General school email or email for primary contact person
	5. [ ]  School web address
6. [ ]  Move on to the **Staff Contacts tile** for the same school.

## To Manage: Update School Contacts

1. [ ] **Review the accuracy of your mandatory contact information**. Mandatory contacts for a public school district include:
	* 1. [ ] Public School Primary Contact: This is usually the building principal.
2. [ ] Click the purple edit icon to make changes. Add Other Contacts as you see fit.
3. [ ] Make sure all Staff Contacts have been managed and updated to reflect current school year data for the specific school.
4. [ ] **Click the School Name** from the breadcrumbs.
5. [ ] Confirm that everything appears accurately in the Staff Contacts tile for the Primary Contact Person:
	* 1. [ ] Title
		2. [ ] Name
		3. [ ]  School phone number
		4. [ ]  Email address

***REMEMBER***: The individual within each local education agency with the [user role “Directory Update”](https://dpi.wi.gov/wise/wisehome-info/wisesecure-roles#SD) needs to update this information for ***EACH SCHOOL*** in the school district.

To do this, **click ‘Schools’ from the breadcrumbs**, **select the next school**, and **repeat** the previous three steps (marked with the repeat icon) for school level information. The table listing all of the schools has an Update Status column to help you keep track of completed work.

[ ]  When all schools have been updated, **Click ‘Home’** from the breadcrumbs.

[ ]  After all schools have been reviewed, confirm that Grades Offered on the Basic Information tile on the Home screen is correct for your school district.

[ ]  Move on to the **Private Schools tile**.

# Private Schools tile:

## To Manage: Private Schools Screen

1. [ ]  **Click ‘Report Private School Closings’.**
2. [ ]  Review the list of private schools.
3. [ ] For any school you know to be closed, click the “Report as CLOSED” button.
4. [ ] **Click ‘Home’** from the breadcrumbs to return to the **Home screen**.

# Home screen:

## To Manage: Home screen

As mentioned at the beginning of this checklist, the “Submit Review” button is the first item that appears on the Home screen and is the last item you should complete. Scan the Home screen to make sure there are no validation messages for data to be reviewed. Address all tiles/screens to correct the data and resolve the validation message.

Across the very top of the Home screen an instructional message will appear. It reads either:

* *Data has not been verified for the 2024-25 school year. Review the data on all tiles and subsequent screens, make changes as needed, and save your changes. Areas with missing mandatory data will display an error message. When done, click the Submit Review button to mark that your data has been managed.*

OR

* *Data submission in Progress, last update MM/DD/YYYY.*
1. [ ] **Click this “Submit Review” button** only after you have reviewed (updated and saved) all data for the current school year. This indicates to DPI that you have clicked every tile from the Home screen, and reviewed the data on every screen, saving changes along the way.

Please [submit your feedback to the Customer Services Team](https://dpi.wi.gov/wise/submit-feedback?n=133206) if you have feedback or suggestions about this form or its corresponding webpages.

If you have questions and need help from a Customer Services Team representative, please [submit a WISE Help Ticket](https://dpi.wi.gov/wisedata/help/request).