TalkingPoints Synced District Partner Roll-Over Guidance

TalkingPoints

Here is guidance for how to roll-over your TalkingPoints accounts, including actions to clean up data from the 23-24 school year as well as how to prepare for the 24-25 school year. We estimate this will take a minimum of 1 hour.

An important note: We know every district has a unique approach to roll-over. Please note that we continue to sync with your integration method (Clever, ClassLink, or TalkingPoints Connector) on a nightly basis throughout the summer. This means we will continue to ingest your data and display it in your TalkingPoints accounts. If you pause your sync, we will continue to display data from your last successful sync.

CLEAN UP FROM SY 23-24

Before July 1:

1. Set your roll-over date. Unless you indicate a different date, staff inboxes will be archived (still accessible) to clean up for the new year on July 1.

2. Make a note of your analytics. Total Messages metric will reset on July 1. Get ready to see growth in the new school year!

Before you share new data for SY 24-25:

1. Hide student schedules from the Family App. Recommended for Clever partners who sync student schedules before you're ready for families to see them *(stay tuned: coming this summer!)*

   a. To hide student schedules through Clever, please follow this guidance.

2. Download and delete manually added data.

3. Review your staff list

   a. Manually Maintained + Manually Added Staff

   b. Bulk Delete Staff

PREPARE FOR SY 24-25

We're excited and proud to be making impactful new features available within your accounts for the new year. Please take some time to review and configure, if applicable.

1. Custom Roles

   a. The ability to manually add or delete student and contact data configured by school permissions will now be set by role. To allow staff to manually add or delete student and contact data, create a custom role!

2. Sync Mapping

3. Student Messaging

4. Regions (*contact your Partner Success Manager to learn more*)

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CHANGE MANAGEMENT + COMMUNICATIONS

Please help us help you! Let your Partner Success Manager (PSM) know if any of the following are changing for you:

- email domains
- student information system
- ClassLink endpoints
- changes in our point of contact for your district
- if you're interested in changing how you integrate with TalkingPoints or have any other updates.

We also encourage you to communicate with your staff and families about what they can expect in their TalkingPoints accounts:

1. Staff:
   - Set out-of-office messages if they're not teaching summer school
   - Let them know the date by which they can expect new schedules to be available to them in TalkingPoints
2. Families:
   - Families who use the Family App will lose access to old messages
   - Families who use text will not be able to continue conversations with the previous year's teachers