

# *Readiness checklist for next term start*

*As Institutions that don't usually follow a traditional term start schedule, most Rush readiness check-lists don't apply. There are, however, certain steps you can follow to make your upcoming term starts, whether monthly, quarterly, or rolling – go more smoothly. Your VitalSource customer success team has put together a 5 Phase checklist and corresponding questions for your review.*

**VitalSource**<sup>®</sup>

## Phase 1 - Gathering & Preparing For Upcoming Term Start

- How do you manage textbook adoptions?
  - How do you obtain course lists for your term starts?
  - How are you notified of which course materials are paired with each course?
  - What is the deadline date for course submission - by X date (depending on your school, it could be 2 to 3 weeks before term start or 4 months ahead of time if quarterly or semester)?
  
- Have you obtained distribution rights for all your needed course materials (either through your publisher or through VitalSource if buy/sell relationship)?
  - Is the title for the course still in distribution? Is there an off-sale date for this title going out of distribution?
  - If it's not in distribution, is there a new edition? If not, another book will need to be selected and distribution rights will need to be obtained.
  - Publishers own the content on the VitalSource platform; therefore, if a title is no longer in distribution, VitalSource must abide by publisher direction and remove it.
  - Correct duration? Do you need 180-day access, 365-day access, perpetual download, or other duration for this eBook?
  
- How will students gain access to their course materials?
  - Who is your internal contact to share when course materials are ready to be made available?
  - Is it through your LMS (learning management system) and/or LMS administrator?
  - If so where in the LMS? Do students click to access their book or is it auto redeemed for them?
  - Are they accessing it directly through the VitalSource bookshelf website and redeeming codes instead of your LMS?
  
- How will the student course materials be paid for?
  - Is it student pay?
  - Is it institution pay (materials included in tuition cost)?
  - Is it institution pay providing codes to students to redeem manually (bulk purchase)?
  
- At any time while preparing for a term start, if you need assistance, email [edsuccess@vitalsource.com](mailto:edsuccess@vitalsource.com) and someone from our success team will help you

## Phase 2- Taking Action For Upcoming Term Start

- When will links be placed in the course?
  - Who internally will be setting up the links in the LMS for each course?
  - Will it be the LMS administrator, the faculty, or possibly you?
  
- Are books/resources ready to be linked to the course?
  - If the book/duration/edition has changed, you must edit/update the link in your LMS.
  - If manual coursebook pairings are required, send the template to VitalSource 2 weeks before classes start.
  
- For the new term, have start, end, and census dates been added correctly in your LMS?
  - Based on your add/drop period, be sure that dates are accurate and reflect when action is needed.
  - If you enter add/drop dates manually (not recommended), these must be provided to VitalSource by December 1.
  
- Have you checked internally that all students can access their materials?
  - Does the intended action by students match the outcome of the LMS set-up (access date, add/drop code, billable code sequence)
  - Quality assurance -- check that links work prior to students accessing them at the start of the term.
  
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## Phase 3- Student Support Resources

- Provide students school specific directions on how to access the school's LMS or gain access to their VitalSource account.
  - This is school dependent and will need to be designed internally for your process as each school is different.
  
- Provide access for students on how to access course materials/eBook from the school's LMS.
  - <https://support.vitalsource.com/hc/en-us/articles/1500013045141-Access-Publisher-Courseware-From-Your-Learning-Management-System-LMS->
  
- Provide "how to" video for students about using bookshelf.
  - <https://support.vitalsource.com/hc/en-us/articles/4407519699351-Video-Getting-Started-with-Bookshelf>
  
- Provide direction to students on how to download the book or read offline.
  - <https://support.vitalsource.com/hc/en-us/articles/204340298-How-do-I-access-the-offline-or-downloadable-version-of-my-book->
  
- Provide direction to students on how to download the book and read after the course ends.
  - <https://support.vitalsource.com/hc/en-us/articles/360052251413-How-to-access-your-eTextbook-after-you-finish-a-course>
  
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## Phase 4 – Troubleshooting Student Issues

- ❑ Establish an internal support contact/system for students at your school, so students know who to reach out to for help. This should be the first point of contact for your students.
- ❑ Provide this guide to your internal support contact/team for resolving error messages students or instructors might encounter
  - ❑ <https://support.vitalsource.com/hc/en-us/sections/4404193753367-Error-Messages>
- ❑ Provide this guide to your internal support contact/team for browser support policy
  - ❑ <https://support.vitalsource.com/hc/en-us/articles/201949723-Bookshelf-Online-Browser-Support-Policy>
- ❑ Provide this guide to your internal support contact/team for resolving basic browser issues
  - ❑ <https://support.vitalsource.com/hc/en-us/articles/360053291074-Bookshelf-Online-Resolving-Basic-Browser-Issues>
- ❑ Additional VitalSource support articles can be found here: <https://support.vitalsource.com/hc/en-us>
- ❑ Students may contact VitalSource support here when the internal support team is unable to resolve the issue:  
<https://support.vitalsource.com/hc/en-us/requests/new>
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## Phase 5 – Your Customer Success Contact Post Term Start

- We are here to assist you as the leader at your school. If you have any questions or require assistance, please email [edsuccess@vitalsource.com](mailto:edsuccess@vitalsource.com). This email is internal ONLY and is specifically for the school contact.
- If there is a widespread issue impacting many students in the course or at the school, contact customer success at [edsuccess@vitalsource.com](mailto:edsuccess@vitalsource.com) and provide screenshots, how many students are impacted, the book title edition and publisher, what LMS and browser are being used, along with any other pertinent student and instructor information. Your need will be promptly routed to the proper team to resolve.
- If you need training on any aspect of VitalSource, email [edsuccess@vitalsource.com](mailto:edsuccess@vitalsource.com) and a customer success team member will reach out to schedule a date and time to virtually meet with you.