



FLOW OF YEAR END PREPARATION STEPS

Purpose – Administration - This document describes the steps a School should follow in preparing for the Year End Process. As in most processes, the better the preparation, the smoother the process will go and the results will be much improved. Please do not hesitate to call us with any questions concerning these steps. We have put them together in what we believe should be the recommended order.

IMPORTANT NOTE: As mentioned many times previously, the Year End process is run for an entire District on a specific date. It is not up to each Building to determine on their own.

Prior to Running the Year End Process:

- **State Reporting for ALL Schools in your District should be completed**
- **Scheduling Activities for Schools using PowerScheduler should be completed**
- Print any Reports you wish to have for future reference (do not assume you can go back and get them later – most likely you cannot.)
- All Grades are Stored for the Current Year

During the Year End Process:

- All Students will be moved to their Next School assignment
- All Students will be moved to their Next Grade assignment
- Many tables will be cleared and re-freshed for the upcoming (new Current Year)
- Bulletin Items will be cleared
- Login records for Parents & Students will be cleared

PREPARING FOR YEAR END PROCESS

Run School Enrollment Audit Report (Click Reports – then Run Reports)

- Look for Overlapping Enrollments (Entry & Exit Dates overlap – a No No)
- Look for Enrollment Dates that fall outside of the defined Years & Term dates (First day of School Entries should be actual first day of school and end of year dates should be no more than one day after the last day of School)
- Clean up any problems you find (Transfer Info link may assist with this)

Run Section Enrollment Audit Report (Click Reports – then Run Reports)

- Look for Enroll – Exit Dates in Sections that fall outside of the defined Years & Term dates
- Look for Students who are enrolled in School but no classes
- Use All Enrollments link (or Modify Schedule link) to clean up any errors

NOTE: If your School has used PowerScheduler for the upcoming School Year and you have committed your Schedule – you may see numerous “No School Enrollment Found” messages – **you can ignore those messages.**



Setup Years & Terms for the Upcoming School Year - ****CRITICAL ****

- Click Years & Terms – define the upcoming School Year
 - **Follow recommended guidelines for setting up Term Dates**
 - **Must do this – even if you are using PowerScheduler and have defined this in PowerScheduler**
 - By performing this task, you will save a lot of time in the future as this copies many setup tables forward so that you are simply updating rather than re-entering from scratch.

Set Next School Indicator for ALL Students

- Every active student must have the Next School Indicator set (CRITICAL)
- Do not forget Incoming Students you may have already enrolled
- Do not forget Incoming Kindergarten students (or Pre-School)
- All Students who complete this School Year (even if you know they will leave next year) should have a Next School and be moved to that School in the Year End process
- Graduating Seniors should be set to Next School – Graduated Students

Set Next Year Grade for ALL Students

- You can set this field value, using Group Functions – “Student Field Value” or you may update some students individually using the Scheduling Setup link on the Student’s record (last link on the left)
- Graduating Seniors should have their Next Grade set to 99
- Students who will be retained should have their Next Grade altered to match their Current Grade

Clear Activities – Activities are automatically moved to the upcoming School Year. **If you do not want Activities brought forward, or perhaps wish to identify specific activities to not move forward**, you will need to clear these activities prior to Year End Processing being run.

To clear Activities (From the School Start Page)

- Click System
- Click Clear Activities (you should see a screen similar to the one below)



Clear Activities

Activity Name	
<input type="checkbox"/>	Basketball
<input type="checkbox"/>	Cheerleading
<input type="checkbox"/>	Cross-Country
<input type="checkbox"/>	Drama
<input type="checkbox"/>	Drill Team

- Check the boxes of the Activities you would like to clear.
- Click Submit

NOTE: This will only Clear Activities of students attending the School you are running it from.

Verify that a Default Grade Level FTE has been defined for ALL Grade Levels

From the School Start Page:

- Change to the upcoming School Year Term (at the top of the Screen)
- Click School
- Click Full Time Equivalencies
- Select the Full Time Equivalency that represents a Full Time Student (these names can vary from District to District) by clicking on the name
- This should open up a screen similar to the one below

Name	<input type="text" value="Full Day"/>
Default Attendance Mode	<input type="text" value="Meeting"/>
Default Attendance Conversion	<input type="text" value="Period to Day"/>
Description	<input type="text" value="For Full Time Students"/>
Default for these grades	<input checked="" type="checkbox"/> 9 <input checked="" type="checkbox"/> 10 <input checked="" type="checkbox"/> 11 <input checked="" type="checkbox"/> 12

Be sure that each Grade Level has the box checked to allow this FTE to serve as the Default for this grade level.



ONE THING TO NOT DO!

Do not Setup your Calendar (individual Day Settings) until you have either committed the Master Schedule in PowerScheduler OR if you manually Schedule Students and use the Copy Master Schedule function. **During these processes, the School Calendar is re-initialized, therefore, attempting to set this up ahead of time, will result in you getting to do the process again.** Please feel free to contact us about this if you have questions.

Once Scheduling Activities Are Completed

A big change from last year, is that when entering new Students, making Schedule changes, etc. it is **critical that those performing these tasks, understand that they must use the First Day of School as the Entry Date, be it as enrollment to School or enrollment in a class or use the First Day of School as the Drop date for Schedule Changes. DO NOT USE THE DATE YOU DID THE TRANSACTION ON!**