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# Year End Processing Using the Year End Wizard

## Overview

This process assists in retaining pertinent student and system information from the current school year. The Year End Wizard option walks the user through each step of the Year End process which includes information on the first screen of each process to assist the user in deciding whether or not to run the process, as well as providing multiple help screens designed to ensure that each process is run correctly. Running the Year End process through the Wizard also allows quick lookup values used last year for each step.

Upon entering the Wizard, there are three specific wizards on the left with a checkmark next to each. Take special note of the color of the checkmark. It provides an alert to identify if some, all, or none of the processes within that wizard have been run. After activating the radio button to the left of the first wizard, the individual processes for this specific wizard display across the top of the screen. Each process displays with either a green (complete), yellow (in progress) or red (not started) checkmark next to it.

The Year End process is divided into three specific wizards and each has processes that need to be run:

- Next Year Table Creation
- Student Year End Processes
- Year Start Utilities

Next Year Table Creation consists of the creation of Entity Year and Term Definitions for the upcoming school year and copying the Scheduling Master and Calendar Information from the current year to the next year.

Student Year End Processes includes options to save student GPA, Attendance and Class History information from the current year. It also contains an option to Mass Withdraw students (i.e. Retained Students, Advanced Students, Outgoing Class) and a Final Process that updates the student's status, graduation year, current year team scheduling group, the staff member's current year status and increments the school year. Final Process completely closes out the current school year and retains the information selected during the earlier parts of the Student Year End Process.

Year Start Utilities assists users in preparing for the upcoming school year. The Clone Codes process provides the opportunity to clone school year specific codes from the current year to the next year (i.e. Absence Reasons, Absence Types, Activity Codes, Attendance Period Times, Attendance Thresholds, Department Codes, Grading Codes, Schedule Groups, Subject Codes, Vaccination Compliance Groups, and Vaccination Links).

## Before Processing Year End

Prior to starting the Year End process basic data protection should be implemented. In addition, some data preparation is necessary in Entities that schedule, Entities that wish to update GPA information or Entities that use supplemental systems (i.e. Food Service, Fee Management, Special Education). Prior to processing Year End the following steps should be taken.

### 1. Complete ALL current year processing:

- Complete the 'Mass Add Students to an Entity' utility (SM/ST/Utilities) for all applicable Entities.

**Note:** This utility may have been completed during Next Scheduling for scheduled Entities and may still need to be run for non-scheduled Entities (i.e. Elementary Entities). This process adds students to a new Entity creating an entry record, but it does not delete or withdraw students from the original Entity (this is accomplished during the Year End process).

- Complete any data entry and/or corrections in Attendance, Grading, Activities, Entry/Withdrawal, Demographics, etc.
- Run the 'Retention and Promotion Report' (SM/OF/YE/YU/YR/RP) and print a report of students to be retained or advanced.
- Flag any students who are being Advanced (and not moving buildings) or Retained (SM/ST/General 1 tab/Edit button). Change either the 'Advance' or 'Retain' field default from No to Yes for the appropriate students and increase the value displayed in the 'Next Year Grad Year' field by one year for Retained students or decrease the value by one year for Advanced students.
- Run the 'Student Graduation Date Mass Create/Change' utility (SM/ST/Utilities) for graduating students prior to printing transcripts. This will print the graduation month and year on WA State Transcripts and will identify graduated students correctly for CSRS.
- Enter all pre-registered students at their current grade level. The status of the student should be entered as follows:

<b>Status</b>	Inactive
<b>Next Yr Status</b>	Active
- Verify that Next Year Setup and Codes processes (SM/OF/FS/SS) have been completed for scheduled Entities.

- Complete the Next Year Scheduling process (SM/OF/FS/SS) for scheduled Entities.
- Recommendation: Complete an 'Actual Schedule Generation' run (SM/OF/FS/AS) prior to processing Year End for scheduled Entities.

**Note:** Next Year will become the Current Year when the Year End process is completed. If an Actual Schedule Generation is not run prior to processing Year End, it can be run after Year End Processing has been completed through Future Scheduling. If the scheduling run will be done after Year End Processing, contact your Data Center to ensure that your district is setup correctly prior to processing.

- If using the "old" Graduation Requirements module, run the 'Grad Requirements – Course Xref Cloning Utility' (SM/OF/AS/GR/RM/Utility button) for scheduled Entities, after cloning the Course Master in Future Scheduling Setup and Codes.
- Coordinate with users of supplemental systems (i.e. Food Service, Fee Management, Special Education).

2. If an Entity will be maintaining GPA information, the following steps need to be performed before starting the Year End process:

- Ensure a historical grade calculation / Mass Audit Report Update (SM/OF/UT/MA) has been processed.
- Calculate the Cumulative Current Year GPA (SM/OF/GR/UT/CG) for the last grading period.
- Run and print a current Student Rank with Update report (SM/OF/GR/RE/SL/SU).
- Print Transcript Labels - optional step (SM/OF/RE/TL/TR or TI).

**Note:** Mass Audit, Calculate GPA and Update Class Rank procedures should be run prior to printing the Transcript Labels to give the most current and up to date GPA and Rank information for each student.

- Run the following reports - optional step:

**Note:** These reports will not be available for this school year after the Year End process has completed.

Grading Reports (SM/OF/GR/RE):

- Honor Roll
- Student Rank
- Report Cards

Attendance Reports (SM/OF/AT/RE):

- Monthly/Quarterly Report

Washington State Reports:

- Attendance Truancy Report (SM/SR/Attendance Reports)
- Federal Special Education Suspension/Expulsion Report (SM/SS/SE/Options/Reports/SR/FE)

3. Review Entry Codes and Withdrawal Codes.

- Add Entry Codes (i.e. Re-entry from Retained or Advanced, Promoted) as necessary (SM/CO/DC/EW/EC).
- Add Withdrawal Codes (i.e. Retained, Advanced, Promoted) as necessary (SM/CO/DC/EW/WC).

4. Complete appropriate system backups (i.e. onsite and offsite copies).

5. Ensure that there are no users in the WESPaC Student Records system while Year End is being processed.

- View Users Connected to the Database (SA/UT/SUVU)
- Lock the WESPaC Student Management system (SA/UT/SU/LU/LS)

**Note:** The 'Lock' feature will not log users off of the WESPaC Student Management system. It only prevents users from logging in after the 'Lock' feature is enabled. Before proceeding with the 'Lock' feature and the Year End process, it is recommended to use the 'View Users Connected to DB' feature to determine which users are currently logged in to the system. The only user that can log in to the WESPaC Student Management system while the 'Lock' feature is enabled is the user id/password of the user who enabled the 'Lock' feature. Only users who have activated one of the 'Lock System Utilities' can activate the 'Unlock All Systems' feature.

## **Food Service - Year End**

Upon entering Food Service, a message may display warning that there are 10 days (or less) remaining in the current year. Food Service Year End processes must be completed by the School Year End Date defined in the Food Service System Defaults. The display of the message is dependant on this date.

### **Before Processing Food Service Year End**

1. Complete ALL Food Service Processing. You will not be able to run the Food Service Year End process with items in batch status.
  - Update any Batch Purchases by running the Purchase Update process (SM/FS/PE/PU).
  - Update any Batch Payments (be sure to leave the date ranges wide open) by running the Batch Update process (SM/FS/PA/BU).
  - Update customers who have changed payors outside of Food Service by running the Update Customer's Payor (Outside Food Service) process (SM/FS/PM/UC).
2. Print hard copies of reports for current year, as current year reports will not be available after the Year End process.
3. Run Year End reports:
  - Payor Balance Summary (SM/FS/UT/YE/PB)
  - Sales Summary (SM/FS/UT/YE/SS)
  - If the district will not be keeping the purchase and payment detail from the current year through Food Service Year End, it is recommended to run and print the Item Purchases by Customer/Date report (SM/FS/RE/RO/IP) with the ranges set to encompass the entire school year. This report will be large and it's recommended to save it to a file.
4. Complete appropriate system backups (i.e. onsite and offsite copies).
5. Ensure that there are no users in the WESPaC Student Records system or Food Service while Year End is being processed.
  - View Users Connected to the Database (SA/UT/SU/VU)
  - Lock the WESPaC Student Management system (SA/UT/SU/LU/LS)

## Processing Food Service Year End

The Food Service Year End process (SM/FS/UT/YE/YE) will automatically run through various steps, including: Audit Report, Audit Fix (if necessary), re-computing the Family's Prior Balance and Deleting and Recreating All Food Service Files (unless the district wishes to hold this information for historical purposes). Once the process is complete, options are also given to Mass Change Students' Price Category and Default Cafeteria, Zero Out All Barcode Numbers, and/or Report on Year End Processes That Have Been Run.

**Note:** You must run the Food Service Year End process from Entity '000'.

### 1. Run the Food Service Year End.

- Answer the question: Does the school want to "Keep this Year's Purchases and Payments"? The checkbox to select this option is located on the 2<sup>nd</sup> screen of the Food Service Year End process.

**Note:** For audit purposes, it is recommended to check this option.

- View and Print the Audit of Payments and Purchases report and the Year-End Process report that display immediately following the completion of the Year End process.

**Note:** If any errors were found during the audit, the Food Service Year End process automatically rectifies these errors. These errors would be shown on the 'Audit of Payments and Purchases' report.

- Close out of Food Service Year End to complete the Food Service Year End process.

## After Processing Food Service Year End

The Food Service Year End screen will change after the Food Service Year End process has been completed. The options 'Suggested Year End Reports to Run' and 'Year End Procedure' are no longer available. Instead, the Year End Options 'Mass Change Customer's Cafeteria' and 'Reset All Customers' Barcode Numbers to Zero' are available, as well as the Report Option 'Food Service Year End'.

**Note:** It is recommended that the following options are run *after* the Student Records Year End processes have been run, so that students are reflected with their next year information.

1. Process any or all of the following based on the district's use of the Food Service system:
  - Food Service Year End report (SM/FS/UT/YE/YE). This is a report of the Food Service Year End steps showing when they were done and by whom and is the same report that was available to print at the end of the Year End process.
  - Mass Change Customer's Cafeteria (SM/FS/UT/YE/CD). This is usually performed for students who have moved to a new Entity (i.e. Elementary School or Middle School to High School).
  - Mass Change Customer's Price Category (SM/FS/UT/MC). This is usually performed for students who have moved to a new Entity (i.e. Elementary School or Middle School to High School).
  - Reset All Customers' Barcodes Numbers to Zero (SM/FS/UT/YE/SC). Only run this option if barcodes will be reprinted for everyone for the next school year.
  - Delete any Payors and/or Customers that should not be carried into the new school year (optional). This should be done prior to entering/creating any purchases, payments or tally sheets for the new school year.
  - If districts have 'Use audit tracking in wand entry' set to Yes in Food Service Configuration (SA/SM/SM/SC/FS), they may want to consider running the 'Purge Wand-Entry Audit Trail' utility within the Audit/Fix programs (SM/FS/UT/AP/UD/PW) to remove all audit transactions from the prior year.

2. Update the Food Service Configuration defaults (SA/SM/SM/SC/FS) to ensure that the setup is accurate for the upcoming school year.
  - *School Year:* Change the value to the upcoming school year.
  - *Start Date:* Enter the start date for Food Service transactions for the upcoming school year.
  - *End Date:* Enter the end date for Food Service transactions for the upcoming school year (the time span between the Start and End dates may not be greater than one year).
  - Verify that the Grad Yr/Grade values in Food Service Configuration (SA/SM/SM/SC/FS) are the correct values for the new school year. These are the ranges that logic will use when determining who to automatically assign a Food Service Key Pad (PIN) number to.

## Fee Management - Year End

The Fee Management Year End process (SM/AD/FM/YE) can be completed **before or after** the Student Records Year End process, but it is recommended to complete the Year End process for all supplemental systems before processing Student Records Year End.

This process is a series of steps that moves Fee Management into the next school year. This process is necessary to prepare for the next year and to “close out the books” for the current year.

Districts must make a decision whether or not they want to move current year fee detail to next year or if they simply want to create an ARREARS balance forward record.

If Fee Management is configured to ‘Bill by Entity’ then the Year End process must be run for each Entity separately.

If Fee Management is not configured to ‘Bill by Entity’ then the Year End process is run from the ‘000’ district Entity.

Refer to online help (search the Index tab for Fee Management, Year End or Year End, Fee Management) for process information and a step by step checklist.

## **Creating Arrears Records in the Next School Year**

**The following outlines the process to create an ARREARS record in the next school year.**

The Fee Management Year End process will do the following:

1. Create 'arrears' records for all balances.
2. Change any 'pre-pays' to payment records.
3. Change school year in the control file to the next school year.

If Bill Codes haven't been cloned for next year, the Fee Management Year End process will display a message asking "There are no bill codes for the next year. Do you want to copy this years bill codes to next year?" Selecting "yes" from this prompt will clone Bill Codes from current year to next year.

As part of the Fee Management Year End process, you will be asked to enter information into the following three fields:

- **Batch Number**  
This field is user defined and not required.
- **Arrears Code**  
Select the code that will contain the sum of current school year past due fees.
- **Due Date for Arrears**  
This field is user defined. It's recommended to use the first day of school in the next school year.

A report will print to show what is being updated. You will then be prompted to update the records, and continue on with the year-end process.

## Moving Fee Detail Records into the Next School Year

The following outlines the process to move fee detail records into the next school year.

In order to have fee detail records moved into next year, complete the steps below prior to processing Fee Management Year End.

Within Fee Management subsystem config (SA/SM/SM/SC/Fee Management/Configuration button) perform the following:

- Select 'Update to General Ledger'
- Select the 'General Ledger Setup' button
- Select the 'Accounting System Used' to be 'Cash Basis'
- Select 'OK'
- Select 'OK' again
- Select Fee Management 'Configuration' again
- DESELECT 'Update to General Ledger'
- Select 'OK'

**Note:** It is very important to deselect the 'Update to General Ledger' option. Not doing so may cause unfavorable results.

When selecting the Year End button the following warning message will display:

“The fee management system configuration indicates that you do not update to the General Ledger and you have your accounting system set to Cash Basis. With the system set this way an Arrears record will not be created for next school year for those payors having a balance other than zero. Having your system set this way will cause the year end process to carry over all billing records for each payor where their balance is not equal to zero. Setting your system to use an Accrual accounting system will cause an Arrears record to be created for balances other than zero and will move all current year billing detail records to history. Do you wish to change the system to run as an Accrual accounting system?”

**Select ‘NO’ to carry forward billing detail to the next school year.**

The Fee Management Year End process will do the following:

1. Change any ‘pre-pays’ to payment records.
2. Move current records to next year if payor has any non-zero balances.
3. Change school year in the control file to the next school year.

**Note:** After step one is completed, a report will print to show what is being updated. You will then be prompted to update the records, and continue on with the year-end process.

If Bill Codes haven't been cloned for next year the Fee Management Year End process will display a message asking, "There are no bill codes for the next year. Do you want to copy this years bill codes to next year?" Selecting 'Yes' will clone Bill Codes from current year to next year.

As part of the Fee Management Year End process, you will be asked to enter information into the following field:

- Batch Number  
This field is user defined and not required.

## Special Education - Year End

The updates and cloning of codes for Special Education (SM/SS/SE/Options/YE) can be performed **before or after** the Student Records Year End Process, but it is recommended to complete the Year End process for all supplemental systems before processing Student Records Year End.

Refer to online help (search the Index tab for Special Education, Year End or Year End, Special Education) for additional information.

### Clone Programs (**required step**)

- This option allows programs and/or services to be cloned from one year to the next. It is necessary to build a set of programs and/or services for each school year. The clone option is an easy method to clone some or all of the programs and/or services from one year to the next. If the programs are cloned, the staff that are associated with the programs will also need to be cloned.

**Note:** This option should clone two years in advance. The programs/services should have already been cloned to the next school year. If so, programs/services should be cloned one additional year during the Special Education Year End process (i.e. if the current school year is 2006, you would clone from 2006 to 2008). If not, two years should be cloned from current school year (i.e. clone from 2006 to 2007 *and* 2008).

### Clone Staff (**required step**)

- This option is very similar to the Clone Programs option. It is necessary to build staff records and assignments for each school year. The clone option is an easy method to clone some or all of the Special Education staff from one year to the next.

**Note:** This option should clone two years in advance. Staff should have already been cloned to the next school year. If so, staff should be cloned one additional year during the Special Education Year End process (i.e. if the current school year is 2006, you would clone from 2006 to 2008). If not, two years should be cloned from current school year (i.e. clone from 2006 to 2007 *and* 2008).

### Maintain Program Update Table (**optional step**)

- This option moves groups of students from one program/school to the next program/school. This process is helpful when moving students from an elementary school to a middle school or middle/junior high to senior high. It is recommended to run current class lists before running this process.

### Update Attendance Area (**optional step**)

- This option will go through all students and update the Attendance Area on the most current Evaluation with the student's Default Entity found on the Entry/Withdrawal record.

- Update IEP/Case Manager (**optional step**)
  - This option allows either the IEP Manager, Case Manager or both to be mass changed for special education students. The process looks at the student's primary placement and the teacher that is assigned as the primary teacher for the program will become either the IEP Manager, Case Manager or become both depending on how the ranges have been set up.  
  
**Note:** If a district doesn't have the primary teacher as the Case Manager or IEP Manager, this utility should not be run.
- Update Program/Service Dates (**optional step**)
  - This option will mass update the service begin and end dates for all or some of the programs and services. This process will need to be run if these dates were guessed at when the programs/services were cloned.
- Update Students Spec Ed School (**optional step**)
  - This option will mass update the Special Education School field, which is located on the Eval Info tab and the General Information screen. This utility will look at the school year selected and the student's primary placement. Based on this information, it will change the Special Ed School field for the student. In order to run this process the Special Education Config must be set to 'Always update the Spec Ed school from the primary placement.'

## Gradebook – Year End

These processes can be completed **before or after** Student Records Year End process.

Gradebook Year End consists of cloning desired Codes and Groups to the next school year and reviewing the WESPaC Grading setup for schools that will be using Gradebook next year.

**Note:** Districts no longer need to run a final Gradebook backup (WB/SM/GB/SE/DO/BK/RB) at the end of the year. Skyward has added a **Prior Years** tab to Secondary Gradebook that allows teachers to view Gradebook data for all of their previous classes.

### **Clone Category Codes** (WB/SM/GB/SE/DO/CM/CC)

1. Click **Year Clone**.
2. Confirm that the **for [current year] to Year:** field contains the correct year.
3. If Codes already exist for the following year that should be overwritten, check the box 'Overwrite Existing.'
4. Click **Process**.
5. Click **Close**.

### **Clone Category Groups** (WB/SM/GB/SE/DO/CM/CW)

**Note:** If a group is cloned, teachers who belong to the group will have their Gradebook settings defaulted to the group settings. However, teachers can override the group settings if they have been give permission to do so.

1. Click **Year Clone**.

This process will clone all Category Groups, regardless of which one is highlighted in the **Category Groups** list.

2. Confirm that the **for [current year] to Year** field contains the correct year.
3. If Codes already exist for the following year that should be overwritten, check the box **Overwrite Existing**.
4. Click **Process**.
5. Click **Close**.

### **Clone Grade Mark Groups** (WB/SM/GB/SE/DO/GM/GG)

See Note for Category Groups.

1. Click **Year Clone**.
2. Confirm that the **for [current year] to Year** field contains the correct year.

3. If Codes already exist for the following year that should be overwritten, check the box **Overwrite Existing**.
4. Click **Process**.
5. Click **Close**.

**Clone Special Grade Mark Codes (WB/SM/GB/SE/DO/GM/SG)**

1. Click **Year Clone**.
2. Confirm that the **for [current year] to Year** field contains the correct year.
3. If Codes already exist for the following year that should be overwritten, check the box **Overwrite Existing**.
4. Click **Process**.
5. Click **Close**.

**Grading Setup Review**

The best time to work on the Grading Setup for a school that will be using Gradebook is during the Next Year Scheduling processes. However, Year End is a good time to review the Grading Setup (SM/OF/GR/CO/GC/GR) for each Entity that will be using Gradebook the following year. The Grading Setup has a significant impact on the display and functionality in Gradebook and Family Access / Grading. A setup that works for WESPaC Grade Entry and EA Plus / Grading may not work for Gradebook. Once grades have been posted from Gradebook, it is often too late to correct the problem. If you're concerned about whether your Grading Setup will work with Gradebook and Family Access / Grading, please contact Student Membership Services for help.

## Student Records - Year End

### Disabling System Access

*Disable login before starting the Year End Process. No one should be in the WESPaC student system while Year End is being processed.*

- View Users Connected to the Database (SA/UT/SU/VU).
- Lock the WESPaC Student Management system (SA/UT/SU/LU/LS).

### Order of Processing Entities

*The Year End process **MUST** be accomplished in the following order (by grade level, from lowest to highest grade level).* This is done in order to set the Default Entity flag correctly on the withdrawal record created during Year End. This flag is then used to determine whether the Entity was the Primary School (Data Element #42) for CSRS and P210 reporting purposes.

- Elementary Schools
- Middle Schools
- Junior High Schools
- High Schools

Any remaining Entities should have Year End processed as well, but can be processed in the order that is desired by the district.

- Summer School Entities
- Entity “999”
- Entity “000” (this Entity should be processed last as it shows which Entities have NOT yet had Year End processed)

### Year End Processes

The Year End Interface Selection screen (SM/OF/YE/YE/SY) offers the choices of ‘Classic’ or ‘Wizard’ to process the Year End tasks. The ‘Wizard’ Year End Interface process will be used in this documentation.

**Note:** A ‘Legend’ for each Year End process is provided and uses colored check marks to designate the status of each process. If a status check mark appears to be displaying the wrong color, verify that the correct ‘School Year To Display Statuses For’ has been selected or click the status check mark and verify the processes that have been run.

1. Run the 'Validate' process.

- Click the '? Help' button for a description of the validation process.
- Click the 'Validate' button to run the process. This process must be run and any errors corrected before proceeding into the Year End Wizard.

2. Run the 'Year End Lists' report.

It is recommended that this report is generated and printed before beginning the Year End processes. It provides a list of values that were used last year as well as the suggested values to use this year for all three of the processes that are run within Year End.

- Select 'Wizard' and then 'Next'. On the Year End Wizard screen select the 'Report' button. Select 'Print Next Year Table Creation List', 'Print Student Year End List' and/or 'Print Year Start List'.

3. Run the 'Next Year Table Creation' process.

Run this process for Entities where the check mark is not green (indicates the process has already been run – through Next Year Setup and Codes or Year End Process). This process creates tables and records needed for the next school year before the 'Student Year End Processes' may be run. Refer to Next Year Scheduling documentation - Next Year Setup and Codes, for assistance with this process.

**Note:** If this process is re-run (for Entities where the check mark is green), the system will process the option 'Entity Year and Term'. The system, however, will not allow you to re-run the 'Scheduling Master' option and you will receive a message indicating that this process may not be run. If this option needs to be re-run for any reason it should be processed through Next Year Scheduling – Setup & Codes (SM/OF/FS/SS/NS/SE). The Next Year Table Creation process will allow the option 'Calendar Information' to be re-run.

4. Run 'Student Year End Processes'.

Ensure that the following are completed before beginning this process:

- Students that are to be retained or advanced must have the appropriate field set to 'Yes' on the Gen #1 tab. Also, the student's NY Grad Year must be one year higher (for Retained students) or one year lower (for Advanced students) than their current Grad Year.
- If the Entity is using the Future Scheduling module to schedule, determine whether an 'Actual Scheduling Run' should be processed.

There is an additional option, 'Process Multiple Entities at Once', which can be selected before running 'Student Year End Processes'.

- Select the 'Process Multiple Entities at Once' option and then the 'Entities' button to select the Entities to process at the same time.

**Note:** Only select Entities with exactly the same grade levels. If Entities are processed together that do not have the same grade level ranges of students, errors may occur during processing. If selecting multiple Entities, the option 'Update Student Class Records With Term Attendance Totals' can not be run. Users will only be able to select Entities that they have Year End security access for and Entities that have the same current school year.

Once the above steps have been reviewed and completed as appropriate, you can proceed with the Student Year End processes.

- Select 'Student Year End Processes' and click the 'Proceed' button.

The following steps will close out the current school year and prepare data for the next school year.

- GPA (Student GPA/Credit totals)
  - This process updates current year GPA information to the GPA tab in Student Demographics. Most high schools and some middle schools save GPA/Credit totals and therefore need to run this process. If this process is run, there is an option to save points and credits for TERM GPA information. Saving of the term GPA information is optional, but is necessary if there is a need later to access and compare term GPA data.
  - If the process to save GPA/Credit totals is not run, it may **NOT** be done at a later time and all current year GPA information will be lost. Many elementary schools do not need to save GPA/Credit totals and therefore do not need to run this process.
- Attendance
  - This should be run if an Entity needs to see summary information in attendance history.
  - This process, if run, allows the Entity to 'Update Year to Date Totals To The Attendance History Records' or 'Update Student Class Records With Term Attendance Totals.'

**Note:** Be aware that the processing time for this option is quite lengthy.

Class History

- This process converts non-graded classes (study halls, lunches) into historical records so that they can be viewed in the student's class history.
- This process also creates schedule transactions for upcoming year's student class records. Transaction records are created for every student class record for the upcoming year that doesn't already have one. This is done to ensure that records are in place for the auto prorating of course fees or to allow viewing of the Add Transaction records.

Mass Withdrawal

- This process can create withdrawal records for 'Retained Students', 'Advanced Students', and the 'Outgoing Class' (students leaving the current processing Entity due to promotion or graduation).

**Note:** Do not choose to withdraw the 'Remaining Students'.

**Note:** If the 'Student Graduation Date Mass Create/Change' utility has already been run, do not choose to update the Graduated Flag and Date during the Mass Withdrawal process as it will override the flag and date previously set through the utility.

Final Process

- This process performs the following tasks:
  1. Increments the School Year
  2. Updates the student's Status using their Next Year Status
  3. Updates the student's Grad Year using their Next Year Grad Year
  4. Updates the student's Current Year Team Scheduling Group with the Next Year Team Scheduling Group
  5. Updates the staff member's Current Year Status using their Next Year status.

**Note:** Ensure that the incoming class (for the Entity being processed) is displayed in the 'Include in Final Year End Process' table.

Review

- Ensure that any student that is to be retained or advanced has the appropriate field set to 'Yes' on the Gen #1 tab. Also, the student's NY Grad Year should be one year higher (for Retained students) or one year lower (for Advanced students) than their current grad year.
- If the Entity is using the Future Scheduling module to schedule, determine whether an 'Actual Scheduling Run' should be processed.

5. Run the 'Year Start Utilities' process.

The 'Year Start Utilities' will assist the user in performing the necessary steps to start a new school year.

Clone Codes

- This process provides the opportunity to clone school year specific codes, including: Absence Reasons, Absence Types, Activity Codes, Attendance Period Times, Attendance Thresholds, Department Codes, Grading Codes (which includes Grade Mark Codes and Grade Comment Codes), Schedule Groups, Subject Codes, Vaccination Compliance Groups, and Vaccination Links.

Mass Entry

- Since the 'Mass Withdrawal' process is not run for 'Remaining Students', do NOT run the 'Mass Entry' process.

Update CY Member Status

- This process updates the Current Year Membership for students if current year status is 'Active' and the student falls within the grad year ranges selected.

Update Student's Default Entity

- This process will update a student's Default Entity to the current Entity as long as the student isn't marked as retained. If the student is retained, then a report will print out at the end of processing that lists the retained students whose Default Entity could not be updated.

**Note:** Only include the incoming class when running this option.

Update the Historical GPA

- This process will update the Historical GPA by running a Mass Audit. Use the same parameters that are used when a Mass Audit is run manually.

**Note:** This process ensures that the process is run with the most recent information now that Year End and Year Start have been run. If this process is not run during Year Start, it can be run manually following Year End/Year Start.

Run the “Calculate Cumulative GPA” process

- This process will calculate the cumulative GPA.

**Note:** This process ensures that the process is run with the most recent information now that Year End and Year Start have been run. If this process is not run during Year Start, it can be run manually following Year End/Year Start.

## Processing Summer School Entities

If the Summer School Entity is being used for scheduling purposes only (no grades are being retained, attendance information does not need to be saved and students are deleted out of the Entity following the end of Summer School) then the Year End process consists only of changing the 'Current School Year' field to the upcoming school year, and adding the Entity Year for the upcoming school year, which includes creating Term Definitions for the Entity (SM/EN/Edit button).

If grades and attendance are being retained in the Summer School Entity, then the Student Records Year End process should be completed as for any other standard Entity (SM/OF/YE/SY).

## Processing Entity '999'

If student information is not maintained in this Entity, then the Year End process consists only of changing the 'Current School Year' field to the upcoming school year, and adding the Entity Year for the upcoming school year, which includes creating Term Definitions for the Entity (SM/EN/Edit button).

If student information is maintained in this Entity, then the Student Records Year End process should be completed as for any other standard Entity (SM/OF/YE/SY).

## Processing Entity '000'

*These instructions are specifically for Entity '000'. Multiple Entity districts need to process the Year End in Entity '000' and **should process Entity '000' last** (SM/OF/YE/YE).*

- Entity Year and Term Definitions Year End
- Increment District School Year
  - The district school year is used for displaying the status of the Year End processes. This option should not be run until all other Entities in the district have finished running the final Year End process.

## After Processing the Year End

Year End Utilities allow the user to inquire or run reports about the Year End process, including:

- View the Year End Status - used to verify which processes have been completed through the Year End process for a specific school year (SM/OF/YE/YU/VY).
- Process Year End Status Report - used to obtain a hard copy of the Year End Status report (SM/OF/YE/YU/PY).