



END OF YEAR (EOY) PREPARATION

The End of Year process is used to close out the current school year and transfer all students to the grade level and school that each will be attending during the upcoming school year.

Schools deadline to have all of the end of year prep done in PowerSchool is June 17, 2016 by COB.



WHAT DOES THE END OF YEAR PROCESS DO?

- Validates that students have Next School set for the current year prior to running this function. *Note: If students do not have these values set, use the Set Next School Group Function to enter the values.*
- Validates that a school year term for the next school year has been set up in all schools.
- Promotes, retains, or demotes students according to each student's Next Grade Level.
- Transfers students from one school to another according to each student's Next School Indicator.
- Carries forward lunch balances while clearing out all financial lunch activity records.



WHAT DOES THE END OF YEAR PROCESS DO?

- Graduates students from district if Next Grade Level is set to 99 and their Next School is set to 999999 (Graduating Students School).
- Sets each student's Exit Date according to the last day of the school year for that school.
- Sets the Next Grade for the new enrollment to the next highest grade level.
- Sets the Next School for the new enrollment to the current school for all students not in the highest grade at the school.
- Sets the Next School for the new enrollment to the school's default graduating school if student is enrolled in the school's Highest Grade.



VALIDATE ENROLLMENT DATES

- **School Enrollment Audit** - School enrollment conflicts occur when the entry or exit date for one school enrollment overlaps the dates for another school enrollment, or extend beyond a valid set of scheduling terms (Years and Terms).



VALIDATE ENROLLMENT DATES

- Start Page > System Reports > click on **School Enrollment Audit** on the *System* tab.
- To verify school enrollment dates, review current and previous enrollments on the Transfer Info student page.



VALIDATE ENROLLMENT DATES

- **Section Enrollment Audit** - Section enrollment conflicts occur if a student's section enrollment dates do not fall within the entry and exit dates for a valid school enrollment or within the first and last day of a valid scheduling term (Years and Terms). Conflicts also occur if a student is enrolled in a school, but not enrolled in any classes.

Note: If your school uses PowerScheduler and you have already committed your schedule, you may see numerous "No school enrollment found" error messages when running the Section Enrollment Audit. These errors may be ignored.



VALIDATE ENROLLMENT DATES

- Start Page > System Reports > click on **Section Enrollment Audit** on the *System* tab.
- To review section enrollment dates, select the *All Enrollments* or *Modify Info* page for a student.



PRINT REPORTS

- While many reports in PowerSchool can return data from prior years, some reports are designed to report on data from the current school year only. After running the End of Year Process, it may be difficult to extract some historical data using certain reports. It is recommended to print and archive several reports for the current school year before running the End of Year Process:



PRINT REPORTS

- State Reports: SC02 – SC08, SC27, SC28, SC30 (45th, 90th, 135th, 180th)
- *SC02 & SC03 will only display data if your school service PK-3 or /and PK-4*
- Start Page > System Reports > State tab > run state reports save, print, and file.

Note: Before running any of the state reports you must run the SC01 report. This report must have zero errors before proceeding on.



PRINT REPORTS

- Global Reports (optional/recommended)
 - Attendance Summary by Grade
 - Period Att. Verification (*High Schools*)
 - Year-to-Date Attendance Summary
 - At Risk
 - Parental Access Statistics
 - Class Ranking
 - Grade Count or by Teacher



PRINT REPORTS

- Grades Distribution
- Graduation Progress Report (PDF) (*High Schools*)
- Honor Roll
- Standard Grades Look-Up (*only if your school grades by standards*)
- Teacher Gradebooks
- Meal Count Listing (PowerLunch)
- Meal Count Report (PowerLunch)

Notes: These reports can be access by going to System Reports > either System or Custom Reports tabs. Also by clicking on PowerLunch.



YEARS AND TERMS

- When a user creates a new year term on the live side at an existing school, PowerSchool copies attendance setup information from the previous school year into the new school year. This eliminates the need to recreate attendance codes, attendance code categories, attendance conversions, FTEs, and more. The school calendar is also generated when a year term is created. When running the End of Year Process, PowerSchool uses the start and end dates of the upcoming school year to determine a student's new entry and exit date.



YEARS AND TERMS

- Start Page > School > scroll to bottom of page and click **Years and Terms**.
 1. Click **New** to create a new school year at the selected school.
 2. Enter the name of the new school year, such as 2016-2017.
 3. Enter an abbreviation, such as 16-17.
 4. Enter the date of the first day of your school year.
 5. Enter the date of the last day of your school year.
 6. Click **Submit** to finish creating the new school year.
 7. Create the individual terms with in the school year for scheduling purposes.



YEARS AND TERMS

Upon creating a new school year, PowerSchool performs the following additional functions:

- Attendance Setup items are copied to the new school year from the previous school year including:
 - Attendance Codes
 - Attendance Code Categories
 - Attendance Preferences
 - Attendance Conversions
 - Bell Schedules
 - Full Time Equivalencies (FTEs)



ADD GRADE LEVEL (*IF APPLICABLE*)

If your school is suppose to add a grade level next year per your charter please submit a ticket no later than **June 17, 2016 COB**. In the ticket list the grades that your school has been approved per your charter to add for the 2016-2017 school year. *This may need to done sooner than later for schools that will be pre-registering students in PowerSchool.*



NEXT SCHOOL INDICATOR

- The End of Year Process uses the value in the Next School Indicator field for each student to determine which school the student will attend in the upcoming school year.
- **Assign Next School Indicators - Single Student**
 1. Select a student.
 2. Navigate to the **Scheduling Setup** student screen.
 3. Locate the Next School Indicator drop down menu.
 4. Select a value from the drop down menu.
 5. **Submit** the page.



NEXT SCHOOL INDICATOR

○ Assign Next School Indicators - Student Selection

1. From the start page, select a group of students. The Student Selection page appears.
2. Select **Next School Indicator** from the group functions menu. The Next School Indicator page appears.
3. Select a next school indicator value from the drop down menu.
4. Click **Submit**. All students in the current selection will be assigned the same next school indicator.



NEXT YEAR GRADE

- The End of Year Process uses the value in the Next Year Grade field for each student to determine which grade level a student will be enrolled in for the upcoming school year. Set each student's Next Year Grade before running the End of Year Process.



NEXT YEAR GRADE

- **Promoted** - Student is being promoted (Next Grade Level is $>$ Current Grade Level).
- **Retained** - Student is being retained (Next Grade Level = Current Grade Level) Next School should be set accordingly.
- **Demoted** - Student is being demoted (Next Grade Level $<$ Current Grade Level).
- **Graduating** - Student is graduating from the highest grade level on the server. These students need to have their Next Grade Level set to 99 and their Next School to 999999 (the Graduated Students School)



NEXT YEAR GRADE

○ Assign Next Year Grade - Single Student

1. Select a student.
2. Navigate to the **Scheduling Setup** student screen.
3. Locate the Next Year Grade field.
4. Enter the student's grade level for the upcoming school year.
5. Submit the page.

Note: If the student is to be retained for the upcoming school year, enter the current grade level.



NEXT YEAR GRADE

○ Assign Next Year Grade - Student Selection

1. From the start page, select a group of students. The Student Selection page appears.
2. Select **Student Field Value** from the group functions menu. The Student Field Value page appears.
3. Enter the following in the Field To Change field:
Sched_NextYearGrade
4. Enter the new grade level in the **New Field Value** field.
5. Click **Submit**. The Field Value page appears and displays all students whose next year grade will be changed.
6. Verify that the proposed changes are correct.
7. Click **Submit** to commit the changes.



COPY THE MASTER SCHEDULE

If Applicable:

When using the Copy Master Schedule function, PowerSchool will reinitialize your school calendar for the target year while copying sections from the source year into the target year. This reinitialization will clear any bell schedules and cycle days specified on the school calendar for the upcoming (target) school year. If your school is using the Copy Master Schedule function, it is recommended that your school does not setup the calendar until after copying the master schedule.



COPY THE MASTER SCHEDULE

- Recommended for elementary and middle schools K-8.
- If you have any 9-12 grades at your school the district office will have to consult with you to make sure this is a viable option.
- If there are numerous discrepancies with the particular schedule you would like to copy from the 2015-2016 school year the district office has the right to deny your request.



COPY THE MASTER SCHEDULE

Steps to perform before :

- Create the next school year under **Years & Terms**
- Make sure new grade levels are added to PowerSchool per your charter.
- Submit a ticket



MEAL TRANSACTIONS

- When running the End of Year Process, PowerSchool rolls over each student's current balance as the beginning balance and clears all meal transactions.
- ***If Applicable:*** if your school used PowerLunch this year after running the reports listed on the next slide please email Zenobia.



MEAL TRANSACTIONS

- It is recommended that you print certain PowerLunch reports before closing out the school year. These reports are unavailable for any school year that has been closed out by the End of Year Process because all PowerLunch transactions are cleared. Use the following navigation to locate PowerLunch reports:
 - Start Page > PowerLunch > Meal Count Listing
 - Start Page > PowerLunch > Meal Count Report



END OF YEAR (FAQ)

Q. Does PowerSchool allow users to report on attendance data from prior school years after running the End-of-Year process?

A. Yes. Many attendance reports can be used to extract attendance data from previous school years. Please note, however, that some PowerSchool reports are only designed to report on attendance data from the current school year. Before running the End-of-Year Process to close out a school year, PowerSchool recommends printing and archiving various user-defined reports, state reports, and global reports.



END OF YEAR (FAQ)

Q. How does the End-of-Year process determine what grade level and school to assign each student?

A. PowerSchool uses the value in Sched_NextYearGrade to determine the grade level that a student will attend in the upcoming school year. PowerSchool uses the value in Next_School to determine the school that a student will attend in the upcoming school year. These values may be set on the Scheduling Setup student screen.



END OF YEAR (FAQ)

Q. I have some students who will not be returning next year. How can I configure their student records so that they are transferred out during the End-of-Year process?

A. The End-of-Year process cannot transfer students out of school. If a student will not be returning to the district in the upcoming school year, manually transfer that student out of school before running the End-of-Year process.



END OF YEAR (FAQ)

Q. After the End-of-Year process, will the lunch staff be able to run PowerLunch reports on data from the previous school year?

A. No. When running the End-of-Year process, PowerSchool deletes all meal transactions and only rolls over the total lunch balance.

Q. Does PowerSchool allow users to choose whether or not to roll over student and staff lunch balances from PowerLunch?

A. No. The End-of-Year process always rolls over student and adult lunch balances and clears meal transactions. **Note:** Fee balances are in no way associated to lunch balances.



**SCHOOLS DEADLINE TO HAVE ALL OF THE END OF
YEAR PREP DONE IN POWERSCHOOL IS JUNE 17,
2016 BY COB.**



QUESTIONS ???

