Utah STATE OFFICE of Education

ASPIRE

Year End Process Checklist

"YEAR-END" PROCESS Checklist

Summary: The Year End process will close out the past school year, deleting all attendance, scheduling, and grade book records, and changing any students or teachers who have "future" status to "active" status.
This process will delete lockers for grade 12 students only. Other locker assignments and locker combinations will not be changed during this process. Changing locker assignments and locker combinations are handled on the web in the Lockers Application and can be done after the year end rollover.

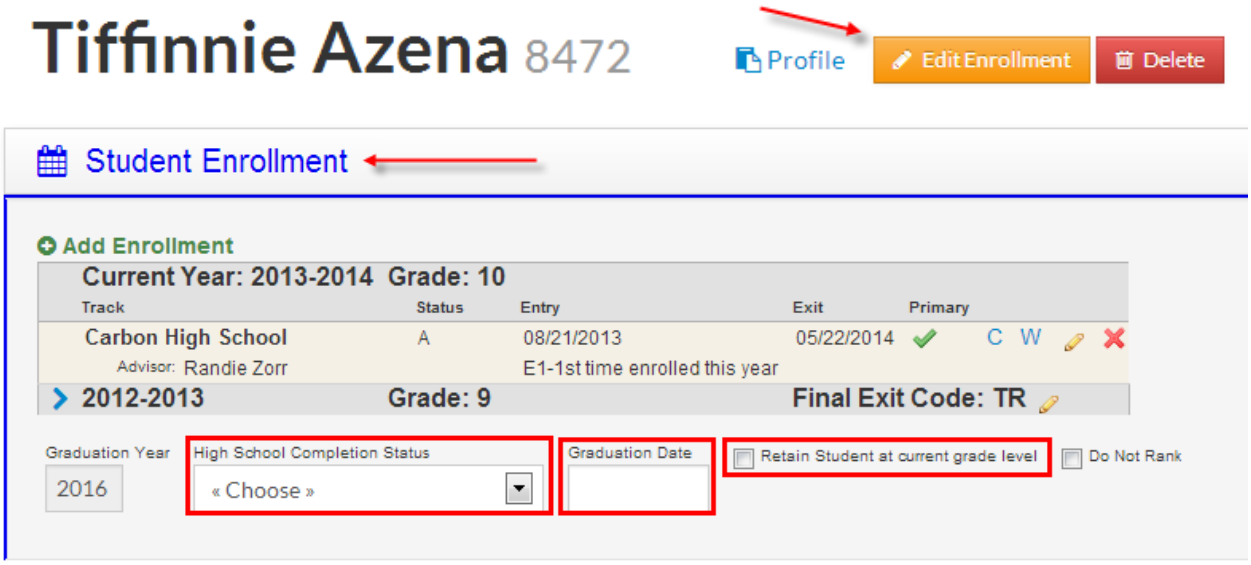
OVERVIEW

New Year Initialization (prerequisite for Year End process):

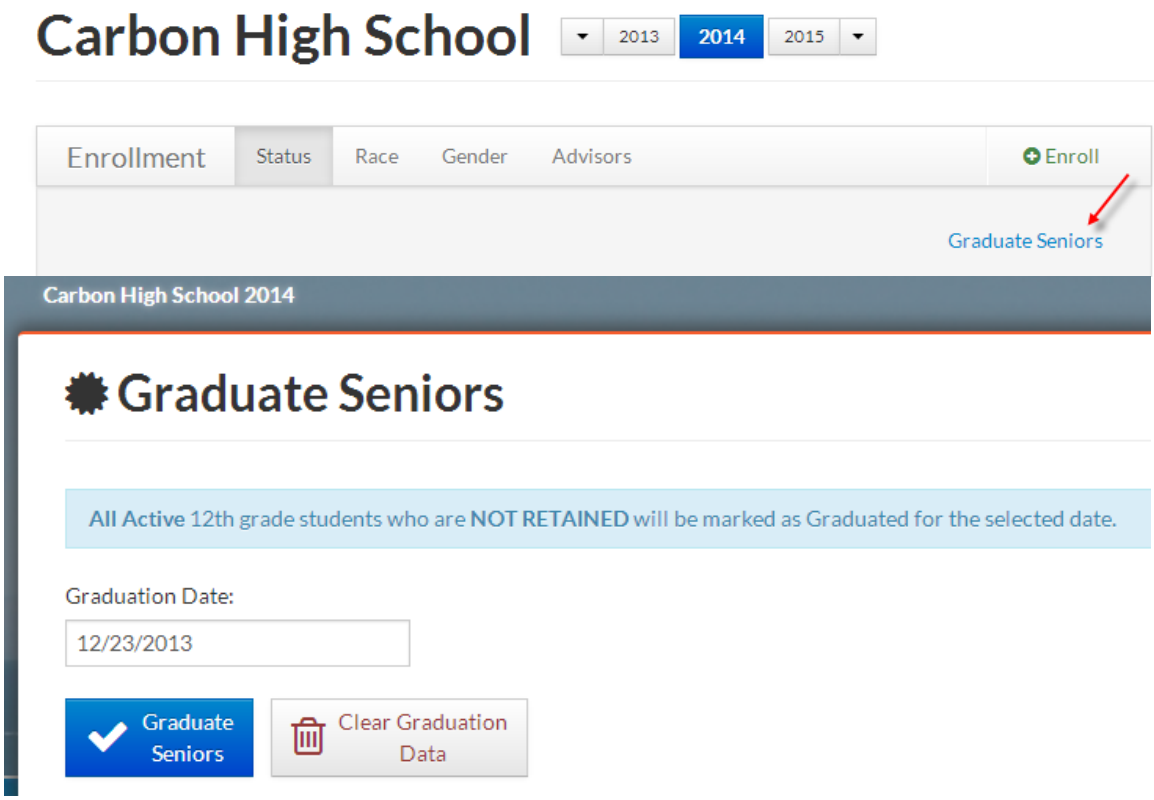
1. Create a future school calendar year track
2. Create future status for faculty and students
3. Copy track courses and modify as needed
4. Copy the master schedule (optional)

Year End Process:

1. Complete and finalize UTREx Data Clearinghouse submission
2. Post all grades to history – this is usually only for secondary schools but, it is optional for elementary schools.
3. Enter calendar for new track, if not previously completed
   Always start Term 1 on the first day of school. Don't leave days between Begin Term and End Terms, even if you are not in school. This includes Saturdays and Sundays.
4. Archive all attendance reports by printing them to pdf format for auditors
5. Archive transcript data (Transcript report screen)
6. Print Behavior Detail Reports to pdf (optional)
7. Verify that "Retain Student" has been selected on the Student Enrollment section, from the Edit Enrollment tab for any student who will be retained in the current grade – including 12th grade "super-seniors"



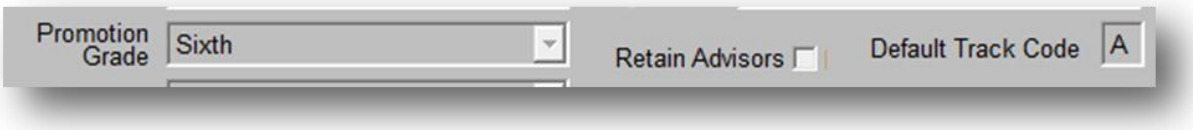
8. **If you are a secondary school with <u>senior students</u> and if you <u>haven't</u> already done this for UTREx Clearinghouse submission.**
   *** Run – Graduate Seniors (Grad Code and grad date).**



9. **This is optional. To rollover Lock Combinations – Go to Lockers Application on the web / select Rollover Lock Combinations / select the school(s) – Follow the Lockers Documentation procedure. This process doesn't need to be done to finish the rollover.**

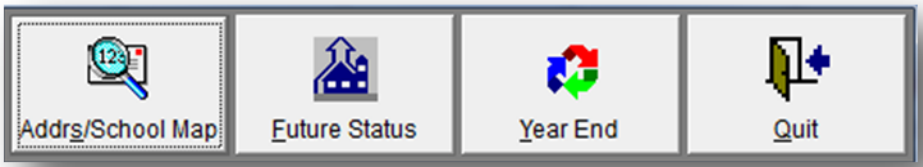
The seniors (Grade Level: 12) lockers will be deleted in the rollover because the 12th graders will no longer be enrolled in the future track.

10. **This is optional. To retain advisors for next year – go to School Editor Module and select 'Retain Advisors'.**



11. **If you host your own server, * Backup and restore your database (to verify backup is fine) to current SIS database. CRITICAL!**

12. Go to New Year Menu (from Main Menu Modules /System Module) and select "Year End" Module.



13. Select 1 or more schools and "Process" (this will delete grade attendance, student scores and marks, last year's schedule, locker assignments and promotes everyone with "future" status to "active" status).

For Users hosted at USOE – Please contact your SIS2000+ specialist to let us know you are ready for us to backup your database before rolling your data to the future year.

**** For LEAs**

using the SIS2000+ Food Service Module:
You will need to run a special food service year-end process after the initial year end process has been done. For more information, please contact Paula Huber at (801-538-7717).

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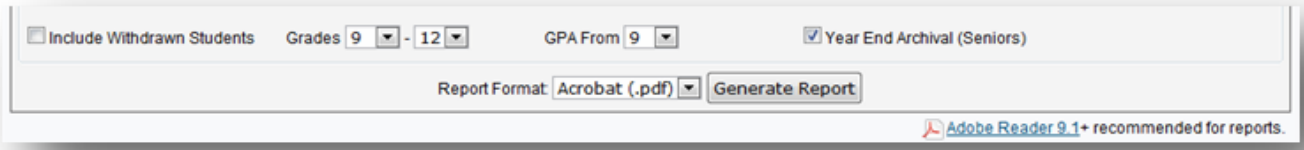
DETAIL OF STEPS 5 and 12 ABOVE:

5. **Archive the transcript data for students**
   a. Log into the web – Select; **Reports Application /Report Category: Academic Progress Report: Student Transcript** – Select: School / Select: ***All Students**

   b. Select Citizenship – Absences – Official Copy and **Generate Reports**

   - **Leaving the "Year End Archival" box unchecked**, perform "regular" archiving and print to a .pdf file (and printer, if desired)
   - Repeat process for Seniors - Check the **"Year End Archival"** box
   - Select "**Generate Report**" to print to a .pdf (Adobe Acrobat) file. This automatically selects all students in the database who graduated one year ago and prints their transcripts to a single pdf (Adobe Acrobat) file grouped by school and sorted alphabetically. **These students will no longer be in the database**.

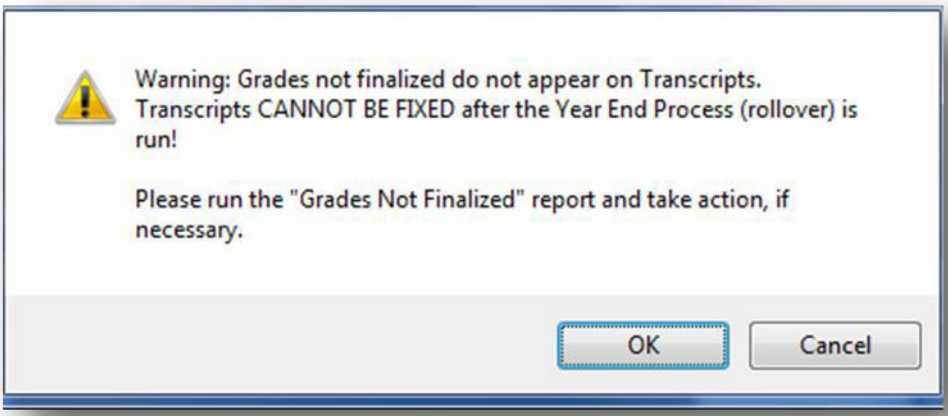


Repeat this process for 'all' reports you want and need to save for auditors.

12. **Year End Process**
    (This process will delete attendance, locker assignments, last year's scheduling, and grade book records for all schools, even if you choose only one! It will also promote students and teachers from "future" to "active" status, for the schools you have selected.)

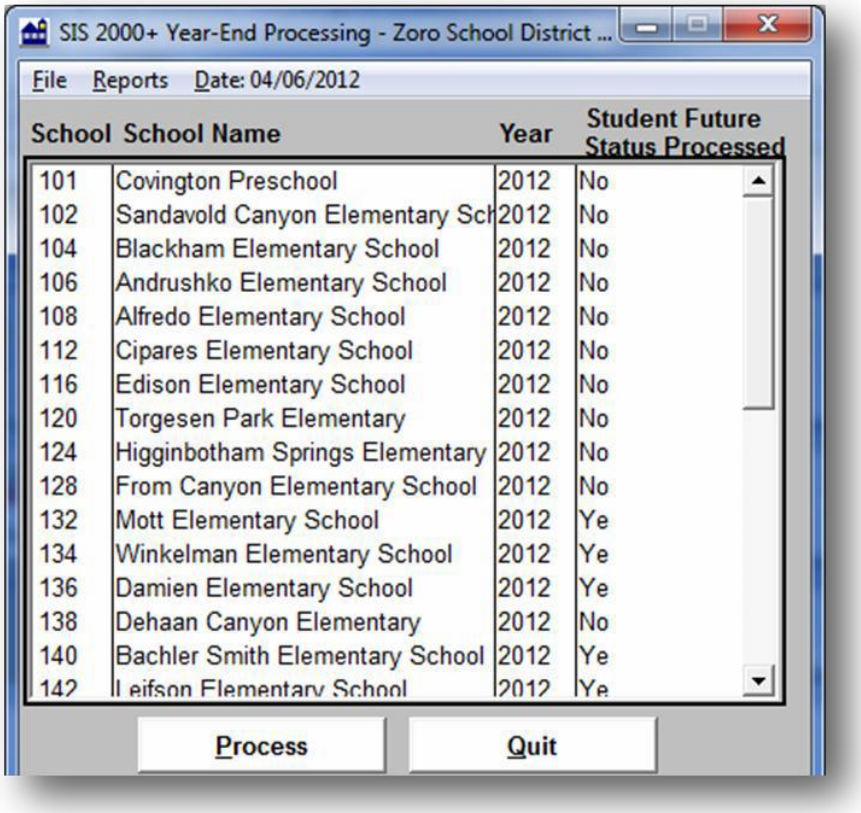
a. Launch the Year End Process from the New Year Menu

You will get a reminder / Warning to make sure you have finalized your student grades (marks). If you haven't, go back and do this, if you have select: OK



b. Select the school(s) that you wish to process.

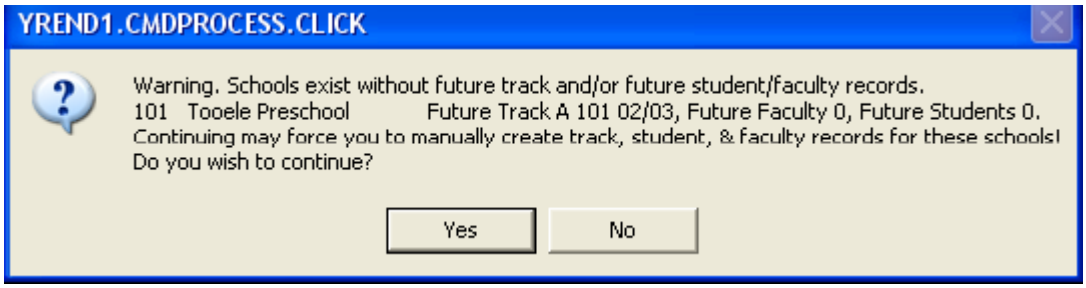
- Only schools that have **not** been "rolled over" to the new year are listed
- All schools, including the District Office, should be processed District Office should be processed last.
- One or more schools can be processed at once, usually the highest grade level working down
- Use typical windows keystrokes (i.e. shift, cntr l) to select multiple schools



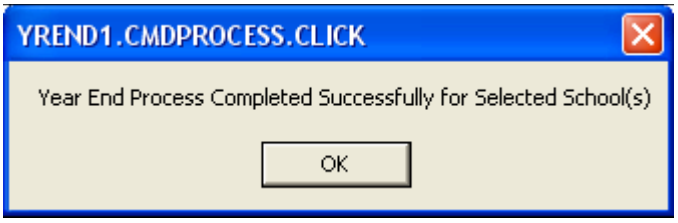
c. **Select - "Process"**

Note: To the right of each school is an indicator of whether or not the "Student Future Status Process" has been completed for the school. You can run the Year End process for schools that have not completed the "Student Future Status" Process, but you will receive a warning. (See graphic below.) Clicking "Yes" will continue the Year End Process; clicking "No" will cancel it.

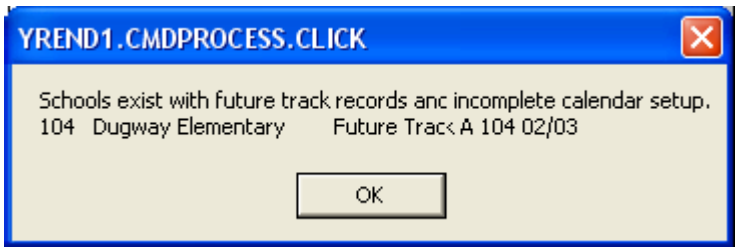
IMPORTANT: It is recommended that you <u>not</u> continue unless you plan to manually promote all students and faculty for the school in question.



d. Successful completion of the process will give you the following message (and the selected school(s) disappears from the Year End Interface School List):



e. If you get either of the messages below, action is needed before the process can be completed:



This means: One or more of the selected schools does not have a complete future calendar (calendar setup must be completed before processing will be allowed).

This means: There are records that cannot be posted due to data errors. The Year End Process has attempted (unsuccessfully) to post the records and continue the process. **IMPORTANT: If you need help identifying unposted records please contact your SIS2000+ Specialist.**