

## New Year Initialization Checklist

- Create future track (**Track editor**)
  - Create calendar (required before scheduling students)
- Create future status for Faculty and Students (**System/New Year Menu/Future Status**)
- Copy track courses (**Scheduling/Mass Scheduling/Course Selection**)  
Select additional courses, if necessary
- Copy master schedule or create new master schedule (**Scheduling/Master Schedule**)
  - Add courses to master schedule, if necessary

**For DISTRICT OFFICE, you must: Create future track, calendar, and future status for faculty**

## SIS Year End Process Checklist

- Get approval on Data Clearinghouse file submission
- Create calendar for new track
- Run 'Grades Not Finalized' report (for each term individually)
  - Finalize grades as needed so they appear on transcripts
- Run end of year reports **and save to .pdf format (store in a new folder on hard drive)**
  - Attendance (run 10 Day audit and at least one of the others listed)
    - 10-Day Audit (run for each term)
    - UT Attendance Term End (**Run with 'Sort Option' = Student**)
      - Run for "All Terms"
      - Include withdrawn students (YTD Attendance check box selected)
      - Include Homebound attendance code, if you use it
    - Student Attendance Detail ("**Select tab/Enrollment/Edit/This year's students**" to include withdrawn students)
    - Note: Auditors prefer that you run the UT Attendance Term End report rather than the Student Attendance Detail, and USOE recommends running both
  - Clearinghouse
    - Run all four Year Round Membership reports (Membership lists, Enrollment and Membership, Graduates and Dropouts, and ATE Membership Report)
  - Transcript
    - Run once with "Year End Archival" NOT checked
    - Run again with "Year End Archival" checked (creates transcripts for students who graduated one year ago and inactive students who have the prior year shown as their graduation year). They will be removed from the database after year end process runs.
  - Report Cards – Run final term (especially important for Elementary Schools)
- Retained Students (on **Student Editor/Misc. tab/Edit/Retain Student checkbox**): select for appropriate students
- Retain Lockers (on **School Editor** screen): check if desire same lockers in new track
- Retain Advisors (on **School Editor** screen): check if advisors should be retained in new school year
- Database processes (**Terminal server schools: USOE does this for you – call SIS Specialist**)
  - Run stored procedure sp\_setgradyear
  - Create end of year database for year just ended (name with old school year)
  - Backup and restore current SIS database into new end-of-year database
  - Verify that restore worked properly
- Year End Process (**Main Menu/System/New Year Menu/Year End**)
  - Select one or more schools (MUST include your District Office)
  - "Process" – deletes gradebook, attendance, schedule, locker assignments, and promotes all future status faculty and students to "active"
- Food Service Module users only:** bring balances forward with 'clear transactions'
  - Run "POS New Year Utility" (**Food Service/Administration/New Year POS**)
  - Run "Eligibility New Year Utility" (**Food Service/Administration/New Year Elig**), if SIS-based eligibility applications are used

Reference Video Tutorial Clips, located at: <http://www.schools.utah.gov/computerservices/Quick-Guides.aspx>

1) "New Year Initialization;" 2) "Year End Process;" 3) "Year End Process – Food Service"