

“YEAR-END” PROCESS Checklist

Summary: The Year End process will close out the past school year, deleting all attendance, locker, scheduling, and grade book records, and changing any students or teachers who have “future” status to “active” status.

For this reason, you must do the New Year Initialization process (which sets up the schedule structure of the new year and ensures that there are students and faculty in the new track) PRIOR to starting the Year End process!

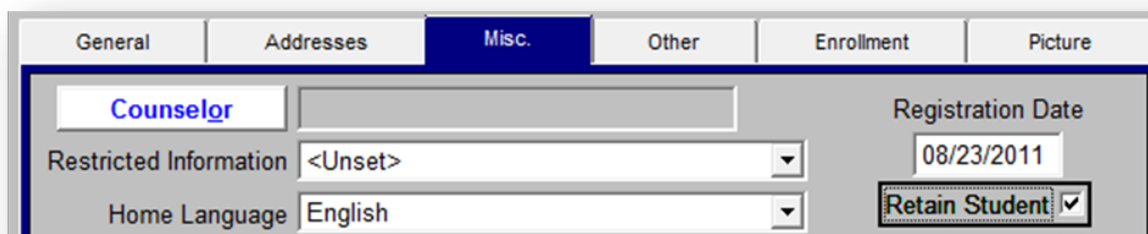
OVERVIEW

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 the 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 Student Editor screen (see “Misc.” tab, Status field) for any student who will be retained in the current grade – including 12th grade “super-seniors”



The screenshot shows the 'Misc.' tab of the Student Editor interface. It includes fields for 'Counselor', 'Restricted Information' (set to '<Unset>'), and 'Home Language' (set to 'English'). The 'Registration Date' is '08/23/2011'. The 'Retain Student' checkbox is checked.

8. * Run - Assign Grad Code – if you are a secondary school



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**

The screenshot shows a web interface for generating reports. At the top, 'Report Category' is set to 'Academic Progress' and 'Report' is 'Student Transcript'. Below this, there are buttons for 'Show Students: In My Track(s) | Advise'. The 'School' dropdown is set to '2012 - Ouellette High School'. The 'Student(s)' dropdown menu is open, showing options: '<< Select a Student >>', '* All Students' (highlighted), 'Abegg, Terran', 'Aboyte, Reynaldo', 'Abrigo, Dionicio', 'Adona, Derk', 'Aeschlimann, Haidyn', 'Aganowski, Paislee', 'Ahrensback, Jeovany', and 'Aiken, Estephania'. Below the menu is a 'Continue' link. The 'Formatting Options' section includes checkboxes for 'Scheduled Courses', 'Citizenship', 'Absences', and 'Official Copy' (checked). There is a 'Job Title' input field. The 'Sorting Options' section has 'Sort By' set to 'School Year'. The 'Filtering Options' section includes 'Include Withdrawn Students' (unchecked), 'Grades' set to '9 - 12', 'GPA From' set to '9', and 'Year End Archival (Seniors)' (unchecked). A red arrow points to the 'Year End Archival (Seniors)' checkbox. At the bottom, 'Report Format' is set to 'Acrobat (.pdf)' and there is a 'Generate Report' button. A footer note says 'Adobe Reader 9.1+ recommended for reports.'

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.**

This close-up screenshot shows the 'Filtering Options' section. It includes the 'Include Withdrawn Students' checkbox (unchecked), 'Grades' set to '9 - 12', 'GPA From' set to '9', and the 'Year End Archival (Seniors)' checkbox (checked). Below this, 'Report Format' is set to 'Acrobat (.pdf)' and there is a 'Generate Report' button. The footer note 'Adobe Reader 9.1+ recommended for reports.' is also visible.

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

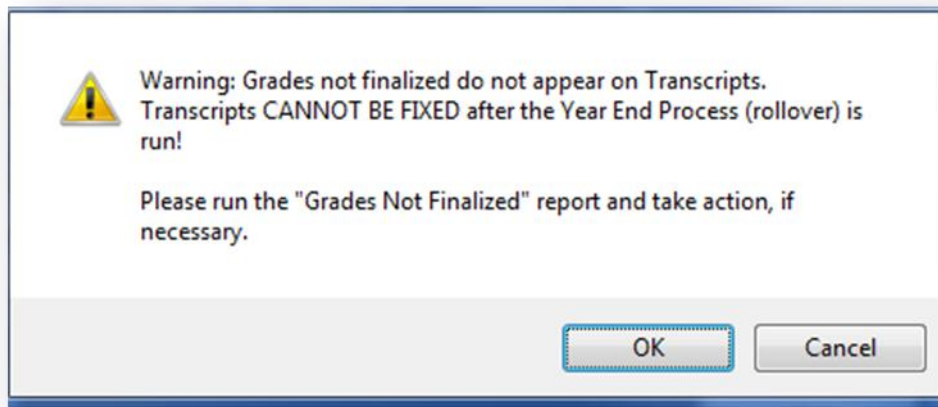
12. Year End Process

(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

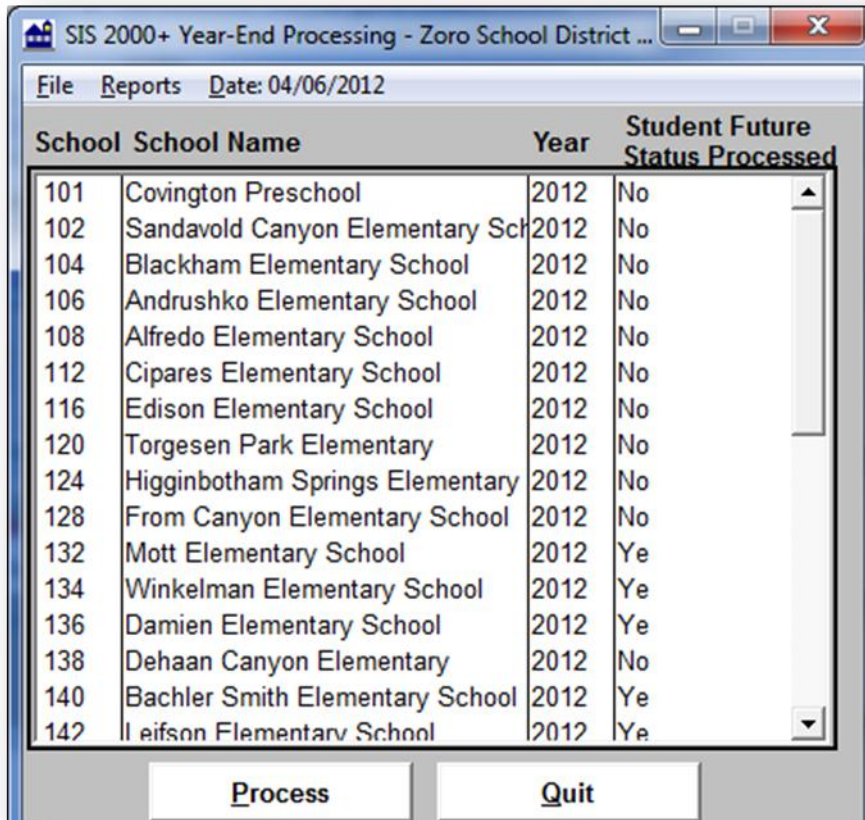


You will get a reminder / Warning to make sure you have finalized your student grades (marks). If you haven't, go back and do this, if you have select: OK



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

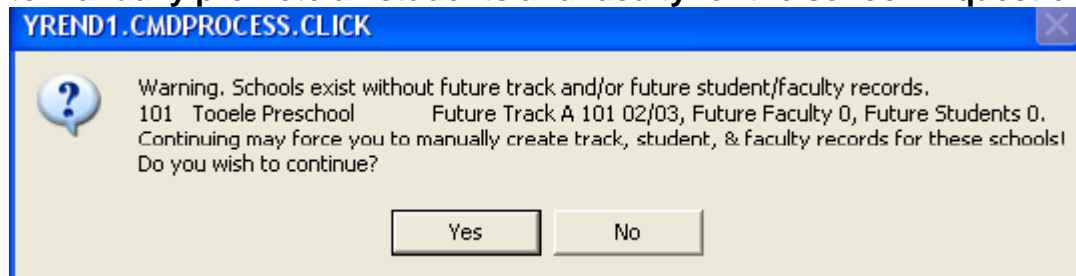
- Only schools that have **not** been "rolled over" to the new year are listed
- All schools, including the District Office, should be processed
District Office should be processed last.
- One or more schools can be processed at once, usually the highest grade level working down
- Use typical windows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

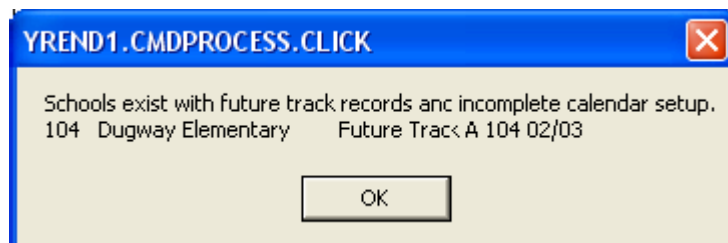
IMPORTANT: It is not recommended that you continue unless you plan to manually promote all students and faculty for the school in question.



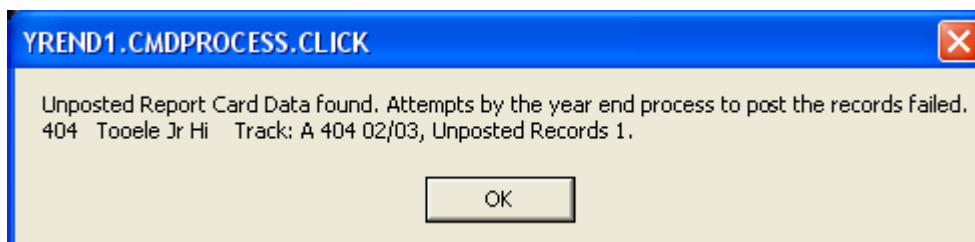
- d. Successful completion of the process will give you the following message (and the selected school(s) disappears from the Year End Interface School List):



- 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.**