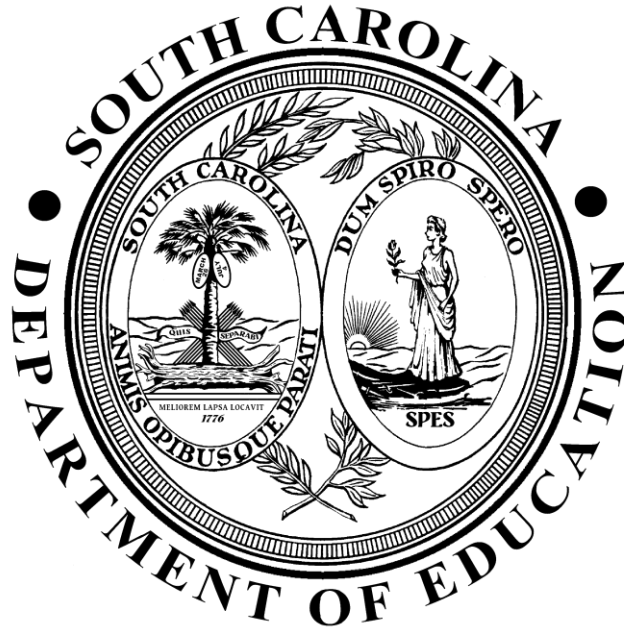


**STATE OF SOUTH CAROLINA
DEPARTMENT OF EDUCATION**

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STATE SUPERINTENDENT OF EDUCATION



**PowerSchool
End of Year Process
Manual for SC Users**

June 2020, Version 2.3

District Technology Directors, PowerSchool District Coordinators

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Audience

The intended audience for PowerSchool End of Year Processing (EOY) procedures includes district staff responsible for verifying, correcting, and assuring accuracy of PowerSchool (PS) field data.

Additional Information

The PowerSchool 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 attend during the upcoming school year.

For additional information, reference documentation provided on PowerSource and PowerSchool Community (Technical Contact status), contact PowerSchool Support or input an eService support request through the South Carolina Department of Education (SCDE) Office of Research and Data Analysis (ORDA).

Out with the Old; In with the New**Student Unique Numbering System (SUNS)**

There will not be an EOY process for SUNS as was necessary in the past. The new SUNS PS Integration Plugin installed during the spring 2020 term changed the method for providing each student with a unique student ID. However, there will be a set of instructions for the Start of Year (SOY) procedures to update the student data for the SUNS database. The information will be posted on the [SC SUNS](#) webpage. This update allows for a more accurate view of the last location for the student to assist with schools/districts searching for transfer students.

2020 COVID-19 Event

SPECIAL NOTES: The Corona Virus (COVID-19) Pandemic has made it necessary to provide special procedures for any areas of our student records. A special appendix is added to this guide to cover the changes for the school year ending May/June 2020. As additional information or procedural changes are made available, updates will be provided through the SISSupport listserv for you to share with your staff.

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Introduction

The PowerSchool End of Year (EOY) Process is used to close out the current school year and transfer all students to the grade level and school that each will attend during the upcoming school year.

BEFORE EOY Process

Note the following steps to ensure the end-of-year data submitted to SCDE represents the most accurate information for all students at Day 180 or the final calendar day for the school year:

- ✓ **Step one:** Fix all errors and complete all missing information (stored grades, incident management (IM), individualized graduation plan (IGP), attendance, enrollments, etc.) for all students for the current school year. For the purpose of checking for errors and missing data, use the Level Data validation tool, PS Enrich Data Collection DQR process. Do not begin transferring out students YET!
- ✓ **Step two:** Submit your final day 180 data (Quarterly Data Collection 4 - QDC4). *Notify SCDE all files have been uploaded through the Enrich Data Collection Tool. Once final data are submitted, DO NOT resubmit any additional student data for the current year.* SCDE will then block any further submissions of your data for any 180-day queries to prevent over-writing your final submission. Contact your PS support at SCDE with uploading issues or re-transmitting of data.
- ✓ You are NOW ready to begin your EOY processing steps – review all EOY documents.

Specifically, the End of Year (EOY) Process:

- Sets each student's future year Exit Date to the last day of the future school year.
- Sets the student's grade level for the upcoming year.
- Sets the student's school of enrollment for the following year. (In some cases, this will transfer the student to the next school of enrollment.)
- Carries forward lunch balances and clears all lunch records.
- Removes all parental access records.

In addition to transferring students to their next school enrollment, the End of Year Process also clears the field values for the following tables:

- Batches – PowerLunch serving sessions
- BulletinItems – Daily bulletin records
- DBLog – Tracks various changes made in Direct Database Access (DDA)
- GLDetail – PowerLunch meal transactions and deposits
- Logins – PowerSchool login sessions
- PhoneLog – Guardian web access sessions
- Lunch balances are transferred from one year to the next.
- Fee balances can be cleared or transferred from one year to the next.

Yearly Process Summary

EOY does much more than move students ahead and change their next year values. It transfers students to the next school and year, and it sets their exit date as the last date of that year. For this reason, it requires that years and terms are set up for all schools, and that there is a default FTE for all grade levels. Remember that EOY processes data at the district level, so all students and all schools must be set up correctly.

When EOY moves students ahead, it is enrolling them in the school for the new year and enrolling them in the courses in your committed schedule (if you have committed your schedule using PowerScheduler). Therefore, it changes the entry and exit dates for the student to those the school has set for the next year. It also assesses any school or course enrollment fees to the student when it makes those enrollments.

In addition, it carries forward the past year's lunch and fee balances, while deleting records of individual transactions and parent access records. Activities are carried forward, so if you don't want students to be assigned to the same activities automatically, you should clear that data prior to running EOY.

There are several preparatory steps you should take prior to running EOY. These include validation of school enrollments and section enrollments, verification of years and terms, and default FTEs for grade levels.

You should take some precautionary steps before you run EOY. These steps include making sure you have backups, running any reports that might be more difficult to access after you close out the year, and exporting historical grades.

Finally, you should close out all this year's business before running EOY. This includes storing grades for the final term and committing your schedule (if you are using PowerScheduler). If you are running summer school, you must use remote enrollment for the summer programs so that you can process EOY at any time during the summer. (Refer to South Carolina's "PowerSchool Remote Summer School Guide.")

REMEMBER—if someone at any of your schools used Direct Enrollment for any summer school session(s), you will need to know this. If students are directly enrolled into a summer school, you will need to wait for the summer session to end, transfer those students back to their regular-term school and then run the EOY process.

Guide Overview

The PowerSchool End of Year Process Guide describes how to prepare for and run the PowerSchool End of Year Process, as well as several common tasks that must take place upon completing the PowerSchool End of Year Process. This guide is divided into the following sections:

- Preparing for the End of Year Process
- Performing the End of Year Process
- After the End of Year Process
- Appendix

Preparing for the End of Year Process

Before running the PowerSchool End of Year Process, several steps are necessary to prepare your PowerSchool database to close out the school year. The steps described should be completed in the order listed in the following checklist. This process usually begins after completing the final term of the school year.

End of Year Preparation Checklist

Before beginning, make sure to permanently store grades and standards, and perform an initial backup of the PowerSchool data file. Throughout the EOY process, make multiple backups of the data and APPLICATION files as any data values are corrected.

Make a copy of the entire PowerSchool folder on the server in case there is a need to restore the application to the exact state it was prior to making changes to any data or performing the EOY process.

PowerSchool strongly recommends that users create a document to independently track all changes as they are made to any data. If the backup file or files must be used, the detailed changes were noted.

SC Transcripts and Class Rank – Best Practice

It is **STRONGLY RECOMMENDED** that all transcripts are “printed” to PDF and saved to the local computer and/or a CD, USB, or other archivable media. Once your seniors are moved to “Graduated Students,” class rank can no longer be accurately calculated, and transcripts should not be printed via PowerSchool.

Print senior transcripts as early as possible and save them. Then print transcripts for your other grade levels and save as well. Transcripts and class rankings should be printed and archived for all grade levels where appropriate.

End of Year Preparation Checklist

Use the following checklist to track your progress through the End of Year Preparation phase.

- ☐ Store Grades for the Current Year
- ☐ Validate School Enrollments
- ☐ Validate Section Enrollments
- ☐ Print Reports
- ☐ Backup PowerSchool
- ☐ Create Years and Terms (required)
- ☐ Assign Next School Indicators (required)
- ☐ Assign Next Year Grade Values (required)
- ☐ Clear Activities
- ☐ Configure Default Grade Level for FTEs (required)

- ☐ Configure Fees
- ☐ Complete Scheduling and Commit Schedules
- ☐ Print Meal Transactions and PowerLunch Reports
- ☐ Print / Extract State Reporting Information
- ☐ Export Historical Grades

Check for Duplicate Student Records

At the District Level, check for duplicate student records.

- Lastfirst
- Student_number
- Grade_level
- Schoolname
- DOB
- Street

For any duplicate students, find which record has the most complete and accurate information for attendance, schedules, demographics, etc. Populate any missing values in the most complete student record and verify all data values have been accurately entered. Working with the duplicated record: mark the record as exclude from state reporting, put an entry/exit comment as “Duplicate Record”, and transfer the student to a holding school such as the “Duplicate Records School.” The “Duplicate Records School” should be excluded from state reporting.

Validate School Enrollment Dates

Run the School Enrollment Audit report.

1. Log into PowerSchool.
2. Navigate to Start *Page* > *System Reports* > *School Enrollment Audit* to run the report. The Possible Conflicts page appears.
3. Review the possible school enrollment conflicts and make any necessary corrections.

Note: 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). To verify school enrollment dates, review current and previous enrollments on the Transfer Info student page. Current school enrollments are stored in the [Students] table and previous school enrollments are stored in the [ReEnrollments] table.

Validate Section Enrollment Dates

Validate section enrollment dates by running the Section Enrollment Audit report.

1. Log into PowerSchool.

2. Navigate to *Start Page > System Reports > Section Enrollment Audit* to run the report. The Possible Conflicts page appears.
3. Review the possible section enrollment conflicts and make any necessary corrections.

Note: 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. To review section enrollment dates, select the All Enrollments or Modify Info page for a student. Section enrollments are stored in the [CC] table.

Run Additional Data Validation Reports

Run the data validation reports under System > Special Operations. Choose Data Validation Reports. This path takes you to a list of reports you can run which identify errors in the tightly linked set of tables that are used to make student schedules. These are also the reports you run to identify problems leading to syncing errors in the database. Also, you may not be able to run Enrollment by Grade or Enrollment by Section reports while these errors persist.

Print Reports

WHY Print Reports? After running the EOY process, it is difficult to extract some historical data using certain reports. Therefore, print any reports you might need, such as report cards, transcripts, and form letters. For example, print copies or save PDF files of your school's transcripts for this year's graduates.

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:

- **User Defined Reports:**

- Object Reports
- Report Cards
- Form Letters

- **State Reports:**

These State Reports should be submitted, run, and printed for both the 45th and 135th days prior to running End of Year Processing:

1. Membership and Attendance Report & Worksheet(s)
2. Master Classification List (Alphabetically by Grade)
3. Cumulative Class Report & List(s)
4. District Summary Report for Membership and Attendance
5. Add-on Weightings Report(s)
6. Add-on Weightings List(s)

As a best practice, all state reports should be run and archived for the 45th, 90th, 135th, and 180th day of school. For additional information about retention of data for audit requirements, refer to the [Pupil Accounting Manual](#) located on the SCDE website.

- **Global Reports** (i.e., reports listed on the Run Reports page, found by navigating to *Start Page > Reports > Run Reports*, including Attendance Summary by Grade, Period Att. Verification, and Meal Count Report)

Backup PowerSchool: Highly Recommended

Backup and archive your PowerSchool database. Preparation for the End of Year Process may involve modifying many records in the PowerSchool database. Mistakes may be undone by reverting to a database backup. Archive this backup in a safe location and label the backup as “prior to” End of Year preparation and processing.

Resource: [Oracle Backup and Restore Guide](#)

Years and Terms: Required Step

The End of Year process will NOT run if this has not been completed.

Create the upcoming year term at each school, even if the years and terms have already been created in PowerScheduler. 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.

Note: 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.

Use the following steps to set up Years and Terms for each school:

1. Log into PowerSchool.
2. Click **School** at the top of the page. The Change Schools page appears.
3. Select the appropriate school from the list. The school Start page appears.
4. Navigate to Start Page > School Setup > Years & Terms.
5. Click **New** to create a new school year at the selected school.
6. Enter the name of the new school year, such as 2017-2018.
7. Enter an abbreviation, such as 17-18.
8. Enter the date of the first day of your school year.
9. Enter the date of the last day of your school year.
10. Click **Submit** to finish creating the new school year.
11. Repeat steps 2 through 9 for each school in your district that will be in session during the upcoming school year.

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)
- Calendar Day records are created for the new school year.

Next School Indicator

This step is required.

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. Set each student's Next School Indicator either individually on the Scheduling Setup student screen, or en masse by updating the Next_School field with an import using the Student Field Value group function.

Students in the 12th grade who will be graduating should have their next school indicator listed as the "Graduated Students School."

Note - pre-registered students must have their next school indicator field set as well.

Next Year Grade

This step is required.

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. This can be done individually on the Scheduling Setup student screen, or in groups by updating the Sched_NextYearGrade field with an import using the Student Field Value group function.

Students in the 12th grade who will be graduating should have their next grade level set to 99. PowerSchool uses this number to indicate that these students are finished with school and should be moved to the Graduated Students School.

Note - Pre-registered students must have their next grade field set as well.

Clear Activities

All student activities are automatically carried over during the End of Year Process. Clear any student activities and non-essential fields that should not carry over into the next school year.

This task can be accomplished for groups of students using the Clear Activities function, located by navigating to:

Start Page > System Administrator > Clear Activities

Default Grade Level for FTEs

This step is required.

Verify that each grade level has a default Full-Time Equivalencies (FTE) for the upcoming school year. If a student transfers into a grade level that is not assigned a default FTE, the student is not assigned an FTE for the upcoming school enrollment. To access the FTEs for the upcoming school year, select the upcoming school year from the Term menu then navigate to Start Page > School Setup > Full-Time Equivalencies (FTE).

1. Log into PowerSchool.
2. Click **School** at the top of the page. The Change Schools page appears.
3. Select the appropriate school from the list. The school Start page appears.
4. Click **Term** at the top of the page. The Change Term page appears.
5. Select the upcoming school year from the list. For example, if you are closing out the 2016-2017 school year and the 2017-2018 school year is the upcoming school year, select 2017-2018.
6. Navigate to Start Page > School Setup > Full Time Equivalencies.
7. Select an existing FTE. The FTEs displayed on this page were copied over from the previous school year when the new year term was created.
8. Check the appropriate boxes near the bottom of the FTE to designate that FTE for the desired grade levels. Please note that only one FTE can be the default for a given grade level.
9. Click **Submit**.
10. Repeat for each school that will be in session for the upcoming school year.

Fees

Configure school and course enrollment fees. You can then assess the enrollment fees for both school and courses for individual students or groups of students.

SC Specific End of Year Considerations

Take special note of the following suggested procedures.

Exit Students from Special Program Enrollments

SC Special Program enrollment entries should be closed out at the end of each school year. Enter the last day of school in the Exit Date field even if the student has not exited the program during that school year. Without an exit date, students will continue to appear active in the program and show up on PowerSchool lists. Districts/Schools must enter exit dates to ensure PowerSchool program lists reflect accurate enrollment.

Instructions for populating exit dates and exit code for Special Programs:

1. To close a single student's program navigate to *Start Page > Special Functions> Special Programs* and edit the fields as appropriate.
2. To close a group of students, select the students by program and go to *Start Page > Special Functions> Special Programs*. When you edit the fields, the values you enter will populate all selected students' fields.
3. To mass exit all students actively enrolled in special programs, you can use DDE to select all students with Special Program enrollments by the Program ID number. Modify the exit date to the last day of the school year and enter "EY" for the Exit Reason code.

Graduating Students--Special Considerations

Always verify the following for your graduated students:

1. Next Grade set to 99
2. Next School set to 999999.

Student's class RANK (out of) field(s) are **not** carried forward after the EOY process moves graduated students to the "Graduated Students" School. Additionally, the name of the school from which the student graduated is replaced with a "Graduated School" identifier.

Review/update procedures for your preservation of access to student's class ranks and School Name information; suggested options are as follows:

- Print and save/store the final transcripts for all students after final GPA/RANK calculations. The .pdf transcripts may be re-printed, as necessary.
- Create custom fields for rank and other desired fields, and copy desired data into these fields prior to EOY Processing.

Scholarship Requirements

In consideration of SC State Scholarship requirements, such as the Palmetto Fellows, student class rank and transcript information for grades 9, 10 and 11 must be stored as well.

Complete Scheduling and Commit the Schedule to Live Side

- Using PowerScheduler to Create Student Schedules

Commit the schedule to the live side once the build and/or load process(es) are completed. The schedule is considered complete when all desired courses and sections are built (via the Build process or Copy Master Schedule function) and students are enrolled into those sections (via the Load process).

Note: The scheduling process in PowerScheduler may be continued after running the End of Year process, but certain extra steps must be taken as a workaround to ensure students are scheduled for the correct school and grade level. For more information, see Knowledgebase article [9687](#).

- Copy Master Schedule on Live Side

If the school manually schedules students on the live side, you may use the Copy Master Schedule function before or after the End of Year process. Reference PowerSchool Community Knowledgebase article [8272](#) for detailed instructions

- Other Scheduling Notes: Years & Terms

After committing your schedule, or copying the master schedule on the live side, check the start and end dates for Years & Terms at *Start Page > School Setup > Years & Terms*. When committing the schedule from PowerScheduler, the scheduling term dates from PowerScheduler overwrite the Years & Terms dates on the live side. When copying the master schedule, the dates from the source year overwrite the Years & Terms dates for the upcoming (destination) school year. Incorrect dates in the Year term will cause incorrect student enrollment dates when running the End of Year Process.

Print Meal Transactions and PowerLunch Reports

When running the End of Year Process, PowerSchool rolls over each student's current balance (stored in [Students]Balance1) as the beginning balance (stored in [Students]Balance2) and clears all meal transactions from the [GLDetail] and [Batches] tables.

To preserve a copy of historical lunch data, export the records from the GLDetail table. This allows the user to review individual lunch transactions after running End of Year without having to restore a PowerSchool backup.

It is also recommended to 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 > Case Report

Start Page > PowerLunch > Meal Count Listing

Start Page > PowerLunch > Meal Count Report

Export Historical Grades

While the End of Year Process does not modify or delete any stored grades, it is good practice to export this data at the end of each school year. Exporting these records provides your district with a snapshot of all grading data at the end of a given school year.

Start Page > System Administrator > Export Historical Grades

Performing the End of Year Process

To set up the End of Year function, you must perform a validation, fix any errors, and complete End of Year. Complete steps in the order listed below:

Performing End of Year Checklist – Required Items

- ☐ Address SC Specific End of Year Considerations
 - Store final transcripts, GPA/RANK/School Name data for graduating students
 - Store final transcripts, GPA/RANK information for scholarship award purposes
 - Exit students from Special Program Enrollments
- ☐ Backup PowerSchool – Pre-End of Year Backup
- ☐ Complete End of Year Setup (required)
- ☐ Default Next School (required)
- ☐ Exit Codes (required)
- ☐ Entry Codes (required)
- ☐ Exit Comments (required)
- ☐ Fee Transfer Method (required)
- ☐ Perform End of Year Validation (required)
- ☐ Review and Correct Errors (required)
- ☐ Perform End of Year Process (required)
- ☐ Verify Setup
- ☐ Confirmation (required)
- ☐ Start End of Year (required)
- ☐ Progress and Completion Message (required)
- ☐ Backup PowerSchool – Post-End of Year Backup

Backup PowerSchool: Pre-validation Backup

Backup and archive the PowerSchool database. Any erroneous changes during this phase may be undone by reverting to a database backup.

Archive this backup in a safe location and label the backup appropriately indicating that End of Year preparation has been complete (per the steps in the *Preparing for the End of Year Process* section), but End of Year validation has not.

End of Year Setup

Default Next School: Required Step

Validate that each school is setup with a valid Default Next School for Students in the High Grade. For example, a high school is typically setup with a default next school of 999999 (Graduated Students).

Use the following steps to set up a Default Next School value for each school:

1. Log into the District Office.
2. Navigate to Start Page > System Administrator > End of Year Process.
3. Review the Default Next School values for each school.
4. If any need to be corrected, update the default next school value at Start Page > District Setup > Schools/School Info > Edit School.

When the End of Year Process promotes a student, the student's Next School Indicator value is set to the school number of the student's upcoming school. However, if the student is going to be enrolled in the highest-grade level for the upcoming school year, the student's Next School Indicator value will be set to the Default Next School value.

Example: A high school student moving from 9th grade to 10th grade is assigned a Next School Indicator for the high school because 10th grade is not the highest-grade level in that high school. However, a student moving from 11th grade to 12th grade is assigned a Next School Indicator value of 999999 (Graduated Students School) if the high school was properly setup with a Default Next School value of 999999.

Enrollment Exit Codes: Required Step

Select an Exit Code for each type of student: Graduating, Promoted to next school, Promoted within same school, and Retained. The End of Year Process assigns these Exit Codes to each student's current enrollment based on a comparison of the student's Next School Indicator, current school, Next Grade Level, and current grade level.

The Exit Codes used during the End of Year Process can be set on the End of Year Process page at *Start Page > System Administrator > End of Year Process*.

If your school requires new Exit Codes navigate to *Start Page > District Setup > Exit Codes > New*.

Enrollment Entry Codes: Required Step

Select an Entry Code appropriate for each type of student:

- Graduating
- Promoted to next school

- Promoted within same school
- Retained

The End of Year Process assigns these Entry Codes to each student's new/upcoming enrollment based on a comparison of the student's Next School Indicator, current school, Next Grade Level, and current grade level.

The Entry Codes used during the End of Year Process can be set on the End of Year Process page at *Start Page > System Administrator > End of Year Process*. If your school requires new Entry Codes, navigate to *Start Page > District Setup > Entry Codes > New*.

Enrollment Exit Comments: Required Step

Select an Exit Comment for each type of student:

- Graduating
- Promoted to next school
- Promoted within same school
- Retained

The End of Year Process assigns these Exit Comments to each student's current enrollment based on a comparison of the student's Next School Indicator, current school, Next Grade Level, and current grade level.

The Exit Comments used during the End of Year Process can be set on the End of Year Process page at *Start Page > System Administrator > End of Year Process*.

Fee Transfer Method: Required Step

Select a fee transfer method. Fee balances can either be zeroed out or rolled over. If the "Roll over the current balance" option is selected, any student with a non-zero fee balance for the current school year will be given a SOY (Start of Year) Balance in their fee transactions for the upcoming school year. If the "Zero the current balance" option is selected, students will start the upcoming school year with a zero balance for fee transactions.

Individual transaction details are not carried forward.

Note: This option does not affect student lunch balances in PowerLunch. PowerLunch balances are always rolled over to the upcoming school year.

End of Year Validation: Required Step

The End of Year Process includes a validation mode during which the system will evaluate student, school, and district information for End of Year readiness. Schools usually run the Validation process prior to attempting the End of Year process. After all errors are corrected, final backups are made, etc., you will run the actual EOY process. The End of Year Process will not run unless all students and schools are properly configured for new enrollments in the upcoming school year.

To initiate the End of Year validation, do the following:

1. Select "Perform EOY Validation" in the dropdown box.
2. Click the button for "Perform End of Year Process."

During the validation process, PowerSchool checks each school and each student for End of Year readiness. Any validation errors are returned.

Review and Correct Errors: Required Step

After running the End of Year Validation, correct any of the validation errors that appear. For an explanation of End of Year validation errors, please see the **Validation Error** available in article [9500](#) on PowerSchool Community. (The Appendix at the end of this guide also lists errors you may encounter.)

After correcting any errors, run the End of Year Validation again as described in the previous section. It is common to perform the validation process and correct errors several times until all errors have been cleared.

Backup PowerSchool – Pre-End of Year Backup

Backup and archive the PowerSchool database. During this stage in the End of Year Process, the data validation has been completed and corrected any errors.

Archive this backup in a safe location and label the backup appropriately indicating that End of Year validation has been completed and no more validation errors exist in your PowerSchool database.

For detailed instructions on backing up PowerSchool Premier, review the [Oracle Backup and Restore Guide](#) on PowerSchool Community. PowerSchool End of Year Process

End of Year Process: Required Step

Once all validation error messages have been corrected, perform the End of Year Process and close out the school year by navigating to *Start Page > System Administrator > End of Year Process*.

The End of Year process is performed at the District level, so all students in the district will be rolled over at the same time. **This is an irreversible process; thus, the importance of your backup!**

Verify Setup

Earlier, when running the End of Year Validation, selections for various Entry Codes, Exit Codes, and exit comments were assigned during the End of Year Process. Verify that these settings are still correct before proceeding with End of Year. These settings appear at the bottom of the End of Year page.

Begin the End of Year Process

From the dropdown select “Perform End of Year Processing and Promote Student” then click the “Perform End-of-Year Processing” button to start the End of Year Process. If you have cleared all validation error messages, PowerSchool will begin closing out the school year and creating new school enrollments for active students.

Allow several hours for the process to complete. Be sure that the server is able to run uninterrupted (without being shut down) while this process runs through to completion. The process may take less than an hour or run for several hours depending on the size of your district.

Progress and Completion Message

After starting the End of Year Process, PowerSchool will provide you with feedback on the progress of the End of Year Process.

Leave your browser on this page while the End of Year Process is running. This progress indicator will display several messages as shown in the following screen shot.

The End of Year Process is complete once you see the “End of Year Process Complete” message as seen above. You may not see this message if you allow the browser window to timeout. Check back periodically or use the Server Log as shown below to monitor the progress of the End of Year Process.

Note: If you accidentally close your browser during the End of Year Process, or if your browser window “times out,” you can monitor the End of Year Process progress on the PowerSchool server by viewing the server log.

To view the server log, select Log Window from the hidden PowerSchool menu on your PowerSchool server. You can also view the server log in your browser by navigating *to Start Page > System Administrator, System Logs > System Log > View Current System Log File.*

Backup PowerSchool – Post-End of Year Backup

Backup and archive your PowerSchool database. During this stage in the End of Year Process, you have completed the End of Year Process and students are promoted to their upcoming school enrollments.

Label and archive this backup in a safe location indicating that the End of Year Process is complete.

For detailed instructions on backing up PowerSchool Premier, review the [Oracle Backup and Restore Guide](#) using your PowerSchool Community account.

After the End of Year Process

After the End of Year Process has been completed, there are several recommended tasks to perform before starting the upcoming school year. The tasks described in this section are not required since the End of Year Process has been completed. However, a thorough review of your school setup before the beginning of the upcoming school year will help ensure a successful transition into the next school year.

Post-End of Year Checklist

Use the following checklist to track your progress through the Post-End of Year tasks.

- ☐ **Years and Terms**
- ☐ **Periods**
- ☐ **Cycle Days**
- ☐ **Attendance Codes**
- ☐ **Attendance Code Categories**
- ☐ **Attendance Conversions**
- ☐ **Full Time Equivalencies (FTEs)**
- ☐ **Attendance Preferences**
- ☐ **Bell Scheduled**
- ☐ **School Calendars**
- ☐ **Reporting Segments**
- ☐ **Final Grade Setup**
- ☐ **Current Grade Display**
- ☐ **GPA Student Screens**
- ☐ **GPA Calculations**
- ☐ **Honor Roll Methods**
- ☐ **Final Grade Entry Options**
- ☐ **Activities**

Years and Terms

Verify the starting and ending dates of your Years & Terms for each school in your district by navigating to *Start Page > School Setup > Years & Terms*.

Periods

Verify the number of periods and the period abbreviations for the new school year by navigating to *Start Page > School Setup > Periods*.

To adjust the number of periods in a given school year:

1. Navigate to *Start Page > School Setup > Years & Terms*.
2. Click the link in the Year column to modify the selected year. The Edit School Year page appears.
3. Select the number of Periods from the Periods menu.
4. Click **Submit**.

Cycle Days

Verify the number of cycle days and the cycle day abbreviations for the new school year by navigating to *Start Page > School Setup > Days*.

To adjust the number of cycle days in a given school year:

1. Navigate to *Start Page > School Setup > Years & Terms*.
2. Click the link in the Year column to modify the selected year. The Edit School Year page appears.
3. Select the number of Cycle Days from the Days menu.
4. Click **Submit**.

Attendance Codes

When creating the new Year term for a new school year, PowerSchool copies the attendance codes from the previous school year, eliminating the need to setup attendance codes each year from scratch. Verify the Attendance Codes are setup for the upcoming school year. Ensure that the proper codes are designated as presences or absences and are properly counted in ADA here: *Start Page > School Setup > Attendance Codes*.

Attendance Code Categories

Verify that the correct Attendance Code Categories are setup for the upcoming school year per the SC Attendance guidelines. Most schools use the Excused, Unexcused, and Tardy attendance code categories. Attendance codes must be associated with the Tardy attendance code category to be properly recognized as a tardy. Verify at *Start Page > School Setup > Attendance Code Categories*.

Attendance Conversions

Verify that each attendance conversion is correctly defined for each full-time equivalency on this page: *Start Page > School Setup > Attendance Conversion*.

Full Time Equivalencies

Verify that each Full Time Equivalency (FTE) is assigned a Default Attendance Mode and a Default Attendance Conversion; verify at this page: *Start Page > School Setup > Full Time Equivalencies (FTE)*.

Attendance Preferences

Verify that the attendance preferences are correctly setup for each school in your district. The attendance preferences determine which attendance recording methods are available, the default attendance page for recording student attendance in PowerSchool, the meeting/daily attendance bridge mode, attendance calculation accuracy, and more at *Start Page > School Setup > Attendance Preferences*.

Bell Schedules

Verify that the bell schedules for each school contain the correct number of periods and are associated to the correct Attendance Conversion Method. Only one bell schedule can be used per calendar day and the bell schedule determines which attendance conversion is used on a given day.

Verify that each period in each bell schedule has the correct start time, end time, and is set to count in (or to be excluded from) ADA calculations. If you use the Meeting/Daily attendance bridge, ensure that each bell

schedule has one period assigned as the daily attendance bridge: *Start Page > School Setup > Bell Schedules*.

School Calendars

Verify that each day in your school calendar is properly configured with the correct cycle day, bell schedule, tracks, in-session indicator, membership value, and calendar day type. In-session days usually have a membership value of 1, whereas days not marked as in-session usually have a membership value of 0: *Start Page > School Setup > Calendar Setup*.

Reporting Segments

If your school uses Reporting Segments, ensure that they are updated with the correct dates for the upcoming school year.

Note: Do not update your Reporting Segments until reports have been completed for the school year: *Start Page > School Setup > Reporting Segments*.

Final Grade/Reporting Term Setup

Ensure that your final grade reporting terms (store bins) are correctly set up for each scheduling term in your school year: *Start Page > School Setup > Final Grade/Reporting Term Setup*.

Quick Lookup Preferences

Update various grade display settings for each school on the Current Grade Display page to determine which final grades to display on the “Quick Lookup” page and whether to display current or historical grades. The value in the Current Grade field determines which final grade reporting term is used as the current grade throughout the current school. The value in the Parent/Student Access Term field determines the data displayed in the public portal. Enter an appropriate term abbreviation. Your term abbreviations may or may not coincide with your final grade store codes: *Start Page > School Setup > Quick Lookup Preferences*.

GPA Student Screens

Update various settings at each school on the GPA Student Screens page. Select a GPA calculation method from the pop-up menu to determine the GPA displayed at the bottom of the Quick Lookup student screen. Update any Data Access Tags (DATs) used for the Cumulative Info student screen. Some DATs on this page may have year or term-specific parameters that need to be updated every year or every term: *Start Page > School Setup > GPA Student Screens*.

GPA Calculations

If your district uses GPA calculations with year-specific parameters or query options, ensure that your GPA calculations are updated with new parameters that pertain to the current school year: *Start Page > District Setup > GPA Calculations*.

Honor Roll Methods

If your school's honor roll methods use year-specific GPA calculations, ensure that the honor roll methods at each school are updated to use GPA calculations that are setup for the current school year: *Start Page > School Setup > Honor Roll*.

Final Grade Entry Options

Review each school's Final Grade Entry Options to ensure that each is setup for the upcoming school year. These settings help determine how grades may be entered via PowerTeacher Portal: *Start Page > School Setup > Final Grade Entry Options*.

Activities

Create any new activities that will be offered in the upcoming school year. When specifying the field name of a new activity, ensure that you are using supported characters for a custom field name. PowerSchool supports letters, numbers, and the underscore (_). While other characters may be accepted by the application when creating the new activity, they may prevent students from properly enrolling in the activity: *Start Page > School Setup > Activities Setup*.

Appendices

Validation Error Messages

The following error messages may appear when performing the End of Year Validation process. Refer to this section to identify a cause and solution for each error message.

- **Error Message**

End of Year Process not completed. The following errors occurred: Smith, John:
Next_School is blank

Cause

The student named in this error message is not assigned a Next School Indicator.

Solution

Assign the student a Next School Indicator on the Scheduling Setup student screen. This value can be assigned for a group of students using the Next School Indicator group function.

- **Error Message**

End of Year Process not completed. The following errors occurred: Smith, John:
Next School is "High School" and next grade is 0, not 9 – 12

Cause

The student is assigned a Next Year Grade Level that is not taught at the student's Next School.

Solution

If the student is already assigned to the correct Next School, correct the student's Next Year Grade on the Scheduling Setup student screen. If the student is assigned to a correct Next Year Grade, you may need to correct the student's Next School Indicator on the Scheduling Setup student screen.

- **Error Message**

End of Year Process not completed. The following errors occurred: Smith, John:
Next_School (123456) is not a valid school in this district.
Next School is "High School" and next grade is 12, not 0 – 0

Cause

The student was assigned a Next School Indicator for a school number that doesn't exist in the District. The school name listed in the last line of this error message is the student's current school.

Solution

This issue is often caused by an improperly configured Next School Indicator at the student's current school. First, verify that the Next School Indicators at the student's current school are configured with a valid school number at Start Page > School Setup > Next School.

Once the Next School Indicators have been corrected at the student's current school, select the student and assign a valid Next School Indicator on the Scheduling Setup student screen.

- **Error Message**

End of Year Process not completed. The following errors occurred: Smith, John:

Grade Level is 99 and Next School Indicator is not "Graduated Students"

Cause

A grade level of 99 is reserved for students in the Graduated Students School. If a student is assigned a Next Year Grade of 99 but is not assigned a Next School Indicator for the Graduated Students School (999999), the student will not be able to graduate.

Solution

If the student is supposed to graduate, set the student's Next School Indicator to the Graduated Students School on the Scheduling Setup student screen. If the student is not supposed to graduate, then correct the student's Next Year Grade on the Scheduling Setup student screen.

- **Error Message**

End of Year Process not completed. The following errors occurred: School 1 is not setup for next year.

Cause

A school is setup for next year only after the year term for the upcoming school year has been created at Start Page > School Setup > Years and Terms. For instance, if a district is running the End of Year Process to close out the 06-07 school year and a school does not have the 07-08 term setup at Start Page > School Setup > Years and Terms, the End of Year Process will not proceed and this error message will appear. PowerSchool uses the term dates for the upcoming school year to determine the entry dates and exit dates for each student's upcoming school enrollment.

Solution

Select the school that is not setup for next year and create the year term at Start Page > School Setup > Years and Terms.

- **Error Message**

End of Year Process not completed. The following errors occurred: School 999999 is not setup for next year.

Cause

This error message may appear when other schools are improperly setup for next year.

Solution

There is no need to create any terms at the Graduated Students School in order to run the End of Year Process. Once all other schools have been properly setup with a year term for the upcoming school year, this error message should no longer be displayed when running the End of Year validation.

- **Error Message**

You did not check the confirm checkbox. End of Year Process will not continue.

Cause

When running the End of Year Process, if the "Check here to confirm that you really want to do this" box was not checked, then the End of Year Process will not run. This error message is normal when running the End of Year validation process.

Solution

It is only necessary to check the "Check here to confirm that you really want to do this" box on the End of Year Process page if you are ready to run the End of Year Process.

Student Withdrawals and No-Shows

The following charts provide guidance for coding students transferring and for coding students relative to No-Show requirements.

Chart	Guidance (Guidelines)
Students transferring before the end of the school year	<ul style="list-style-type: none"> • Withdraw the student • The exit date should be the official withdrawal date • Keep all supporting documentation (records request or transcript request or withdrawal form) • Student PowerSchool records should remain with the previous school.
Students transferring after the school year and before the End of Year Process – Records request from out-of-district school has been received	<ul style="list-style-type: none"> • These students need to remain active through 180th-day reporting. • Hold the withdrawal process until after the EOY process is completed. • Students should roll up to the next grade and school within the district. • No-Show the student as of the 1st day of the new school year. • Populate “No Show Reason Transferred” and populate school transfer information or out of state transfer. • Keep all supporting documentation (records request or transcript request or withdrawal form) i.e. for drop-out, grad rate, etc. reporting purposes
Students transferring after the End of Year Process before the new school year starts – Records request from out-of-district school has been received	<ul style="list-style-type: none"> • No Show the student as of the first day of school. • Populate “No Show Reason Transferred” and populate school transfer information or out of state transfer. • Keep all supporting documentation (records request or transcript request or withdrawal form) i.e. for drop-out, grad rate, etc. reporting purposes
Students who rolled over who never showed up (No Show students)	<ul style="list-style-type: none"> • No Show the student • Mark the student absent for the first 10 days of school • Parent contact should be made during those 10 days • On the 11th day, the student is withdrawn • All attendance should be removed • Entry Date and Exit Date should be the first day of school • Students in grades levels 7-12 will be reported as dropouts • Populate the Dropout Reason and Dropout Date (dropout date should be the first day of school)

Chart	Guidance (Guidelines)
Students who missed up to the first 9 days of schools	<ul style="list-style-type: none"> • The student is enrolled as of the first day of school • Attendance should be taken • Absences should be coded excused or unexcused • Truancy notification should be made and Truancy intervention plan developed if the student missed 3 unexcused absences or a total of 5 unexcused absences • No attendance should be removed
Students who missed 10 days but show up on day 11	<ul style="list-style-type: none"> • The student is enrolled as of the first day of school. • Attendance should be taken as of day 1. • Absences should be coded excused or unexcused. • Truancy notification should be made and the Truancy intervention plan developed if the student missed 3 unexcused absences or a total of 5 unexcused absences. • No attendance should be removed.

Other Resources

[End of Year Frequently Asked Questions](#)

[Rerunning the End of Year Process](#)

[How to determine when End of Year was last performed](#)

[What does the End of Year Process do?](#)

[Student grade levels and the End-of-Year process \(Promoted, Graduated, or Retained?\)](#)

[Latest End of Year Documents on PowerSchool Community](#)

Special Notes for the 2020 COVID-19 Event

The Corona Virus (COVID-19) Pandemic has made it necessary to provide special procedures for many areas of our student records. This special appendix is added to cover the changes for the school year ending May/June 2020.

Senior Class Graduation Data

May 15: All final grades for all senior courses are due. Teachers must ensure grading information is completed so that grades can be stored as historical grade data.

May 22: Grade data are stored, verified, and reports are processed and archived at school and/or district level. These include FINAL transcripts/District Award Documents, CHE reports for scholarship purposes, and any internal reports needed by students, parents, or school/district administrative purposes.

Grade Reporting Procedures for Students, Grades PK-12

[MEMO - COVID-19 Grade Reporting Guidance](#)

[MEMO - COVID-19: SC Uniform Grading Policy Guidance for Students Enrolled in Dual Credit Courses](#)

Waivers Granted from Federal Education

[MEMO – Updates on ESEA Flexibilities](#)