

End of Year Preparation, Process, and Post Activities

With SC Specifics Included

Welcome: Introductions

- ▶ Intro to content
- ▶ Tasks to complete before QDC4 final data transmission to SCDE

End of Year – SC Specifics

Storing Final Grades

PRIOR to submitting QDC4 final data you MUST ensure that final grades for all courses are stored in the Stored Grades table.

Why the emphasis? In the past...

- Uploads had missing stored grade data for CATE students – districts lost Perkins funds (\$\$).
- Student scholarship recipients missed their submission deadlines.

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End of Year – SC Specifics

Graduated Students Data

- Determine (follow) your procedure/plan for retaining final data values for graduating students.
 - Update the Diploma Earned field since SCDE offices use these data for graduate counts.
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End of Year – SC Specifics

Graduated Students Data

- Create user-defined fields to capture data values for class rank by year (for scholarship purposes)
 - Copy/import student-level data into specific fields.
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End of Year – SC Specifics

Graduated Students Data

- Save or archive final, completed “pdf” formatted transcripts for each student whose courses include “credit-bearing” units.

These could include 6th, 7th or 8th, as well as 9th–12th grade students.

End of Year – SC Specifics

To display data elements on Graduated Students' page after the end of each school year, ensure these user-defined fields are available and populated with EOY data; otherwise, store all transcripts in PDF format:

Data Description	PS Base Field Name	User Defined Field Name
Class Rank by year	Graduated_SchoolRank	CRSO–Class Rank Soph CRJR–Class Rank Jr CRSR–Class Rank Sen
Any/all GPA's at end of school by year	Need to store since GPA's are calculated on the fly	
Name of last school	Graduated_SchoolName	
ID for last school	Graduated_SchoolID	

End of Year – SC Specifics

Data values to “clear/remove” so fields are not populated for the next year...

- ▶ Military Parent field

End of Year – SC Specifics

Special Programs: Entry Date and Exit Date

- All students in Special Programs should have an exit date of the last day of school for the current school year prior to EOY process (unless student transferred prior to this date).
- Students must have a new start date for enrollments each school year.

End of Year – SC Specifics

Special Programs: Enrollment per PowerSchool

- ▶ Are not tied to any course, section enrollments, or the Years & Terms
 - ▶ Are tied to a grade level and the school in which the student is enrolled
 - ▶ Should reflect the last day the student was in that program, not the day after.
- 



End of Year – SC Specifics

Retained Students

- ▶ User sets Next Grade Level value in Scheduling Setup page during the scheduling process
- ▶ Students' Current Grade Level compared to the Next Grade Level in the student Schedule Setup Screen
- ▶ Results of comparison allows EOY process to automatically promote, retain, or graduate student

End of Year – SC Specifics

- ▶ Special Schools REALLY need to record their students' DISTRICT OF RESIDENCE.
- ▶ Special Schools include
 - Governor's School for Math and Science
 - Governor's School for Arts and Humanities
 - Dept. of Juvenile Justice
 - Palmetto Unified

End of Year Preparation

READ ME FIRST BEFORE **DOING** ANYTHING

Important EOY Information

- ▶ Before running the PS EOY process, you must follow particular steps in a particular order. (See checklist provided for your tracking these steps.)
 - ▶ You are strongly urged to document carefully all changes you make and indicate when backups are made for your reference throughout this process.
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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
 - Backup PowerSchool
 - Validate School Enrollments
 - Validate Section Enrollments
 - Print Reports
 - 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 PowerScheduling and Commit Schedules
 - Print Meal Transactions and PowerLunch Reports
 - Print Extract State Reporting Information (required)
 - Export Historical Grades
- 

End of Year (EOY) Definition

- ▶ Closes out current school year
- ▶ Transfers all students to the grade level and school for next school year
- ▶ **Important NOTES** for running EOY process:
 - AFTER school year finished
 - AFTER all final grades for current year permanently stored
 - AFTER ALL QDC4 data have been uploaded and closed.
 - AFTER SUMMER SCHOOL TERM (if you are running a summer program using PS).

EOY, Specifically

- ▶ Sets student's Exit Date to last day of school year
 - ▶ Sets student's Next Grade for next year
 - ▶ Sets student's Next School for next year
 - ▶ Removes Parental Access Records
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EOY, Specifically +

- ▶ Batches: PowerLunch Serving Sessions
 - ▶ BulletinItems: Daily bulletin Records
 - ▶ DBLog: Tracks various changes made in DDA
 - ▶ GLDetail: PowerLunch meal transactions and deposits
 - ▶ Logins: PowerSchool Login Sessions
 - ▶ PhoneLog: Guardian Web Access Sessions
 - ▶ Lunch Balances Transferred to Next Year
 - ▶ Fee Balances Cleared or Transferred to Next Year
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EOY Preparation

1. Backup / Archive PowerSchool Data file
 2. Validate Enrollment Dates
 3. Print Reports (for both internal and external audits)
 4. Years and Terms (Required)
 5. Next School Indicator (Required)
 6. Next Year Grade (Required)
 7. Activities
 8. Default Grade Level for FTEs (Required)
 9. Scheduling
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EOY Preparation (continued)

10. PowerSchool Gradebook

11. Meal Transactions

12. Historical Grades



1. Back UP PS Data File (Highly Recommended)

- ▶ Preparing for EOY – modifies records
- ▶ Undoing errors –revert to a data file backup. (Label backup appropriately)
- ▶ Referring to the [Backup and Restore Guide](#) for information about backups – save your headaches (You must be a Technical Contact to access this document.)

2. Validate Enrollment Dates

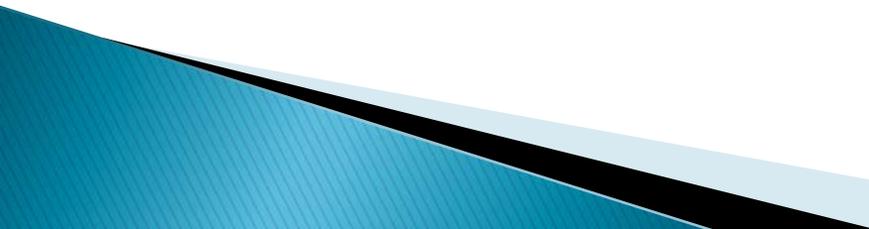
- ▶ **Use Section Enrollment Audit Report**
 - To access the Section Enrollment Audit report, navigate to Start Page > Reports > Run Reports
 - Then click on Section Enrollment Audit.
- ▶ **Use School Enrollment Audit Report**
 - To access the School Enrollment Audit report, navigate to Start Page > Reports > Run Reports
 - Then click on School Enrollment Audit.



3. Print Reports

- ▶ Difficult to extract some historical data
- ▶ Print and archive the current school year reports before running the EOY process:
 - User Defined – Object Reports (Transcripts), Report Cards, Form Letters
 - State or District
 - System

4. Years and Terms (Required)

- ▶ Create new term at the district level and at each school
 - ▶ Note: created automatically on live side
 - Attendance
 - Attendance code categories
 - Attendance conversions
 - FTEs
 - Etc.
 - ▶ Auto-generated calendar (then edit for 180 days)
 - ▶ Start/End dates → Determine New Entry/Exit Dates
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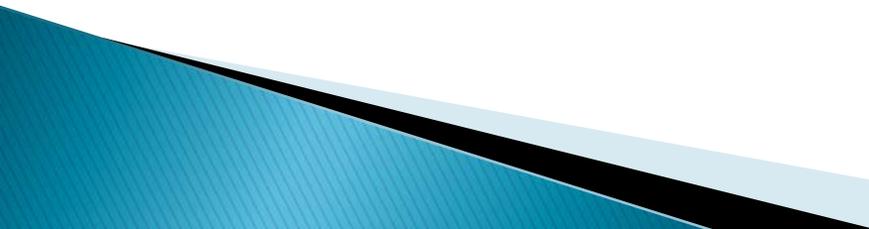


5. Next School Indicator (Required)

- ▶ Determine which school student is to attend next year
- ▶ Must set each student's indicator, individually or by groups by using
 - Import
 - Student Field Value group function
 - DDA



6. Next Year Grade (Required)

- ▶ Determine grade level for upcoming year
 - ▶ Must set prior to running EOY process, individually or by groups
 - Individually -- Scheduling Setup student screen
 - Import to Update Sched_NextYearGrade field
 - Student Field Value group function
 - DDA
- 



Sidetracks: Special Notes for Graduating Students

How to prepare a student for graduation during the End of Year Process

- Ensure that a student will graduate
- Verify Graduated Students School
 - Grade = 99
 - School = 999999

Sidetrack: Special Notes for Graduating Students

To set the Next Year Grade and Next School Indicators for an individual student

- Select the student.
 - Navigate to the Scheduling Setup student screen.
 - Set the Next Year Grade field to: 99
 - Select Graduated Students from the Next School Indicator menu.
 - Submit your changes.
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Sidetrack: Early Graduates (Dec/Jan)

PowerSchool does not include a function that allows administrators to graduate a student early.

However, a workaround is available at PowerSource --

**How to Graduate a Student Early Before EOY,
([article #9586](#))**

7. Activities

- ▶ Know that all student activities are automatically carried forward to the next school year.
- ▶ Clear activities that should NOT move forward:
 - Individually
 - Groups – Clear Activities function located at
Start Page > System Administrator > Clear Activities

8. Default Grade Level for FTEs (Required)

- ▶ Verify default FTE for each grade level.
- ▶ Note: Student transfers must have assigned default FTE
- ▶ Access FTEs
 - Select upcoming school year from TERM menu
 - Navigate to Start Page > School Setup > Full-Time Equivalencies (FTE)

FTEs, Grade Levels, and the End-of-Year Process

- ▶ On "New FTE" and "Edit FTE" pages: checkboxes for "Default for these Grades" -- always unchecked by default.
 - ▶ Checkbox determines which FTE assigned when the End of Year process moves student from one grade level to another.
 - ▶ Although names of FTEs in different years may be the same, each FTE record is unique to each school year.
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FTEs, Grade Levels, and the End-of-Year Process

- ▶ Define "Default for these Grades" values for the upcoming school year's FTEs before running the End of Year process to close out the current school year
- ▶ Important Note: If grade level is not assigned to an FTE when the End of Year process runs, students moved into that grade level, either within the school or coming from another school, **will not** receive an FTE for the upcoming school year and **will need to have one assigned manually**.

9. Scheduling

- ▶ If using PowerScheduler, commit the schedule to the live side.
- ▶ **Method for moving from each school year to next:**
 - **Scheduling/End-of-Year Process:**
 - PowerScheduler
 - Build
 - Load
 - Split Year-Long Classes
 - Commit Schedule
 - **PowerSchool Admin**
 - End-of-Year

10. PowerTeacher Gradebook

Follow District Procedures

To be continued ...

Power Teacher Pro is latest gradebook (PS v 10.x)

11. Meal Transactions

- ▶ Follow District Procedures
 - ▶ Your Backup / Archive of PS data files will allow you to go back to previous files if necessary.
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12. Historical Grades

- ▶ While the End of Year process does not modify or delete any stored grades, it is good practice to export these data at the end of each school year.
 - ▶ Follow YOUR District Procedures
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13. Exit Codes (Required)

- ▶ Select An Exit Code for each type of student: Graduating, Promoted, and Retained
 - ▶ The End-of-Year Process will assign these Exit Codes to each student's current enrollment based on a comparison of each student's Next School Indicator, current school, Next Grade Level, and current grade level.
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14. Exit Comments (Optional/Recommended)

- ▶ Select an Exit Comment for each type of student: Graduating, Promoted, and Retained.
 - ▶ The End-of-Year Process will assign these Exit Comment to each student's current enrollment based on a comparison of each student's Next School Indicator, current school, Next Grade Level, and current grade level.
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15. Fee Transfer Method (Required)

- ▶ Select a fee transfer method. If the "Roll over the current balance" option is selected, any student with a non-zero 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. **Note:** This option does not affect student lunch balances.

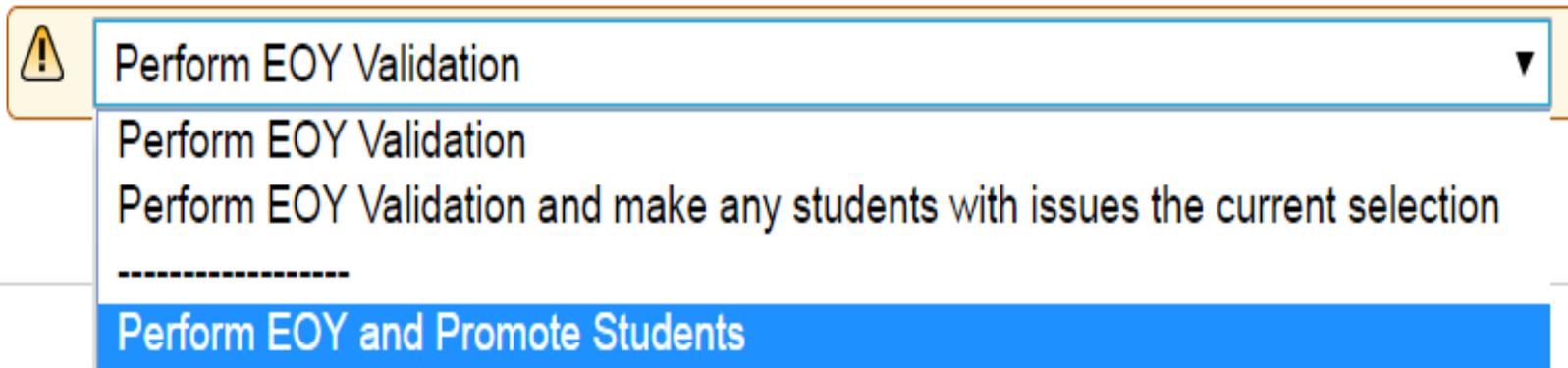
16. Validation (Required)

- ▶ PowerSchool's End-of-Year Process includes a validation mode, during which the system will evaluate student, school, and district information for End-of-Year readiness.
 - ▶ Ensure all fields are properly populated.
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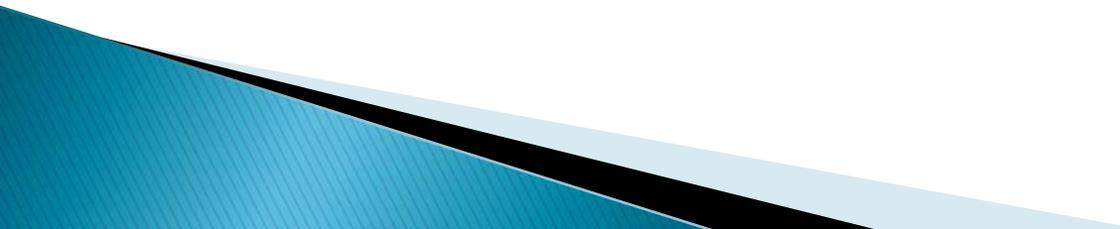
17. Validation (continued)

To initiate the End-of-Year validation, you must do the following:

- Select the appropriate "Perform EOY Validation":



18. Review/Correct Errors (Required)

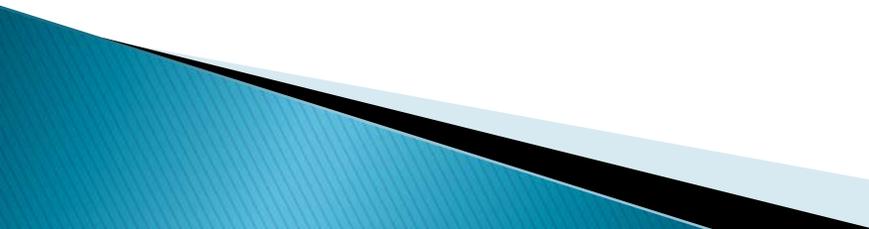
- ▶ As the EOY validation process runs, various student or school-related errors may be displayed on the screen. Review and correct any errors that appear.
 - ▶ The validation process may be repeated multiple times to check your progress while correcting student setup or school setup data.
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19. Review/ Correct – Common Errors

Reference PowerSource for documents pertaining to errors.

Only Technical Contacts may have access to necessary information.

20. Backup PS Data

- ▶ Once all validation errors have been corrected and the validation process no longer returns any errors, **backup** and archive your PowerSchool data file.
 - ▶ Label this backup appropriately to indicate that all End-of-Year validation errors have been corrected.
 - ▶ At this time, it is likely that no more changes are necessary before running the End-of-Year Process.
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21. EOY Process (Required)

- ▶ From the District office, navigate back to Start Page > System Administrator > End-of-Year Process.

System Administrator	
Data Management	
Assign New Student Numbers	Replaces student numbers with new ones.
AutoComm Setup	Set up AutoComm functions.
AutoSend Setup	Set up AutoSend functions.
Change Course Number	Changes a course number system-wide.
Change School Number	Changes a school number system-wide.
Clear Activities	Clears students activities.
Custom Fields / Screens	Creates and edits fields and screens for staff and students.
Direct Database Export (DDE)	Exports information from database directly.
End-of-year process	Closes out and archives student records at end of year.
Page and Data Management	Manage/Customize Data and Pages
Photo Management	Import and/or delete student and teacher pictures.
Special Operations	Runs programs affecting the whole system.
Grades	

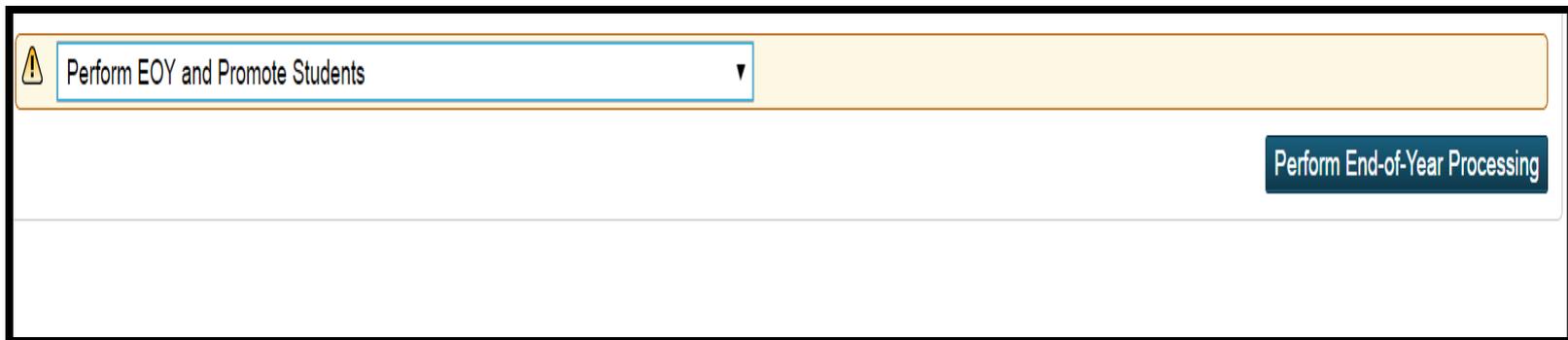
22. Verify Settings

(Optional/Recommended)

- ▶ Verify that the Exit Codes, Entry Codes, Exit Comments, and Fee Transfer Method are still set as they were before running the validation process.
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23. Confirmation (Required)

- ▶ Select “Perform EOY and Promote Students” from the drop-down.
- ▶ Then click the “Perform End-of-Year Processing” box to begin.



The screenshot shows a software interface with a yellow background. On the left, there is a dropdown menu with a warning icon (a triangle with an exclamation mark) and the text "Perform EOY and Promote Students". To the right of the dropdown menu is a dark blue button with the text "Perform End-of-Year Processing".

24. Start the EOY Process (Required)

- ▶ Be sure that the server is able to run uninterrupted (without being shut down) while this process runs through to completion (up to 4 hours).
 - ▶ **Note:** If any schools or students are improperly setup for the End-of-Year Process, PowerSchool will halt the process and return errors. These errors must be corrected before the End-of-Year Process can run.
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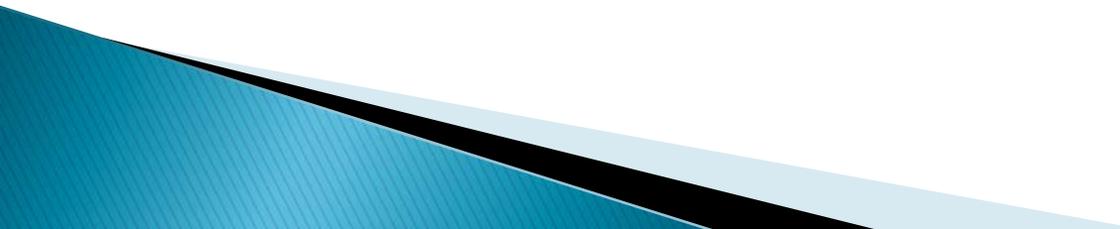
25. EOY Process Complete

- ▶ As the End-of-Year Process runs, PowerSchool will display its progress on the screen.
- ▶ The following message will be displayed in your browser once the End-of-Year Process is complete:

End-of-Year Process Complete



26. Backup PS Data (Opt/Rec)

- ▶ Once the End-of-Year Process is complete, create and archive another backup of your PowerSchool data file.
 - ▶ Label this backup appropriately to indicate that the End-of-Year Process has been completed.
 - ▶ AND NOW Post Activities...
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Rerunning the End-of-Year (EOY) Process

- ▶ NO "undo" function for changes made by the End-of-Year process
 - ▶ If an attempt is made to re-run the End-of-Year process after it has already been completed, an error message will appear stating that the process has already been completed recently.
 - ▶ Contact PowerSchool Support if you have serious problems with your EOY process.
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Rerunning the End-of-Year (EOY) Process (Continued)

Workaround

- ▶ If a district must undo the changes done by the End-of-Year process, the PowerSchool administrator must revert the PowerSchool server to one of the data backups made before executing the End-of-Year process.
- ▶ Once the PowerSchool server has been restored to a state before the End-of-Year process was run, the system administrator may re-run the End-of-Year process.

Post EOY Activities

And you figured you were done...😊

1. Years and Terms

Verify that each school has correct start/end dates:

Start Page > School Setup > Years and Terms

2. Verify Student Enrollments

- ▶ Verify that each student has the correct entry and exit date for the school year.
 - ▶ The EOY process assigns each student a start and end date based on your year term.
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3. Periods

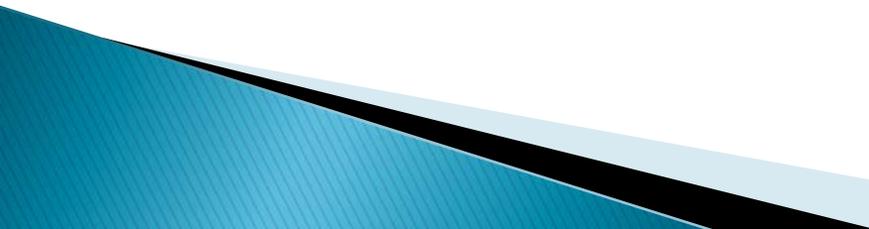
- ▶ Navigate to Start Page > School Setup > Periods
 - ▶ Verify the number of periods for the upcoming school year at each school.
 - ▶ Update the period names and abbreviations if necessary.
- 

4. Cycle Days

- ▶ Navigate to Start Page > School Setup > Days
 - ▶ Verify the number of cycle days for the upcoming school year at each school
 - ▶ Update the cycle day names and abbreviations if necessary
- 

NOTE ... NOTE ... NOTE... NOTE

Attendance Changes, 2017-18

- ▶ Federal guidance requires changes for Attendance reporting.
 - ▶ Attendance Codes will be updated in a future SCDE State Reporting Release.
 - ▶ Setup based on minutes per period or minutes per day.
 - ▶ **Training** for School Setup/Attendance provided by SCDE before the end of July, 2017.
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5. Attendance Codes

- ▶ When creating a new year term, PowerSchool copies the attendance codes from the previous school year, eliminating the need to recreate attendance codes from scratch.
- ▶ If necessary update attendance codes at each school:

Start Page > School Setup > Attendance Codes

6. Attendance Code Categories

- ▶ When creating a new year term, PowerSchool copies the attendance code categories from the previous school year.
- ▶ Update attendance code categories at each school:
 - Start Page > School Setup > Attendance Code Categories
- ▶ Note: in order to display tardies properly on the Quick Lookup, associate each tardy attendance code to the Tardy attendance code category.

7. Attendance Conversions

- ▶ When creating a new year term, PowerSchool copies the attendance conversions from the previous school year.
- ▶ Update attendance conversions at each school:
 - Start Page > School Setup > Attendance Conversions

8. Full Time Equivalencies (FTEs)

- ▶ When creating a new year term, PowerSchool copies the FTE from the previous school year.
 - ▶ Ensure that the FTE is assigned a default attendance mode and a default attendance conversion.
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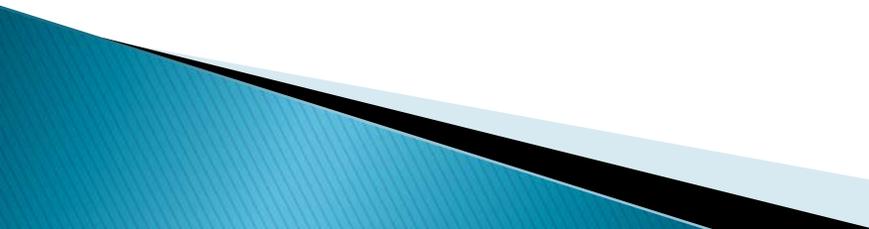
9. Attendance Preferences

- ▶ When creating a new year term, PowerSchool copies the attendance preferences from the previous school year.
- ▶ Make any changes to the attendance preferences at each school:
 - Start Page > School Setup > Attendance Preferences

10. Bell Schedules

- ▶ When creating a new year term, PowerSchool copies the bell schedules from the previous school year.
 - ▶ Modify bell schedules for each school at
Start Page > School Setup > Bell Schedules
 - ▶ Verify that each bell schedule is assigned an attendance conversion method.
- 

10. Bell Schedules Continued

- ▶ Determine which periods will occur in each bell schedule.
 - ▶ Determine which periods count towards ADA calculations.
 - ▶ If using the meeting/daily attendance bridge, indicate which period is the bridge period in each bell schedule.
 - ▶ Avoid enrolling students into overlapping periods.
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11. Calendar

- ▶ Configure the school calendar at each school:
Start Page > School Setup > Calendar Setup.
- ▶ Ensure that each in-session day is assigned a cycle day from the “Day” drop-down menu.
- ▶ Select the appropriate bell schedule from the drop-down menu.
- ▶ Check the School In-Session box.
- ▶ Enter the appropriate Membership Value of 1.
- ▶ Optional: Set the type for each in-session day.

12. Reporting Segments

- ▶ If your school uses reporting segments, ensure that they are updated at each school with the correct dates:

Start Page > School Setup > Reporting Segments

13. Final Grade /Reporting Term Setup

- ▶ Ensure that your final grade store codes/reporting terms are properly setup at each school:

Start Page > School Setup > Final Grade/Reporting Term Setup

13. Final Grade Setup (Continued)

- ▶ Final grade reporting terms are specific to the term in which they are created. For instance, a Q1 final grade reporting term setup for the Year term applies only to year long classes.
 - ▶ This is different from the Q1 final grade reporting term setup for the Semester 1 term which only applies to Semester 1 classes.
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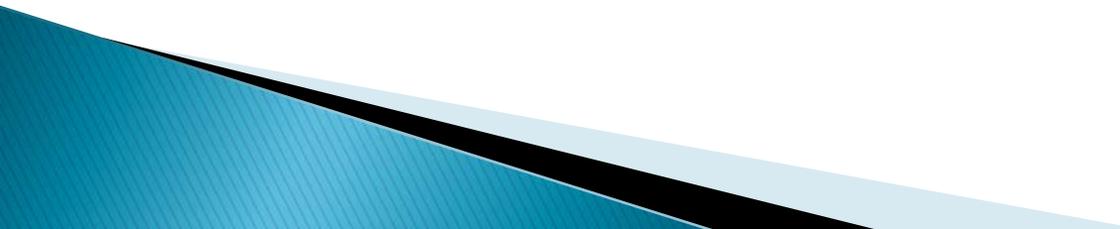
14. Quick Lookup Preferences

- ▶ Update various grade display settings at each school

Start Page > School Setup > Quick Lookup Preferences

- ▶ Here you can determine which final grades to display on the Quick Lookup, and whether to display current or historical grades.

14. Quick Lookup Preferences (Continued)

- ▶ The Quick Lookup Preferences determines which store code is the current grade throughout the current school year.
 - ▶ The Parent/Student Access Term 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.
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15. GPA Student Screens

- ▶ Update various settings at each school
 - ▶ Start Page > School Setup > GPA Student Screens
 - ▶ Select a GPA calculation method from the pop up menu to determine the GPA displayed at the bottom of the Quick Lookup student screen.
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15. GPA Student Screens (Continued)

- ▶ 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 which may need to be updated every year or every term.

16. GPA Calculations

Follow guidelines in the latest documentation from SCDE.

17. 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.

19. Activities

- ▶ Create any new activities that will be offered in the upcoming school year.
- ▶ Activities can be created at

Start Page > School Setup > Activities Setup

19. Activities (Continued)

- ▶ When specifying the field name of a new activity, ensure that you are using supported characters for a field name; i.e., PS supports letters, numbers, and the underscore (_).
 - ▶ Note: While other characters may be accepted by the application when creating the new activity, they may prevent students from properly enrolling in the activity.
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Docs Stolen from PS to Create this PPT

- ▶ End of Year (EOY) Preparation (9497)
 - ▶ Running the End of Year (EOY) Process (9498)
 - ▶ EOY – Default FTEs and Grade Levels (6491)
 - ▶ Common End of Year (EOY) Validation Errors (9500)
 - ▶ Post End of Year Activities (9501)
 - ▶ How it Works: Special Programs (55160)
 - ▶ How to Graduate a Student Early Before EOY(9586)
- 