**End of Year Process**

**(Adapted for the Diocese of Green Bay From PowerSource ID 9497)**

The End of Year (EOY) process closes out the current school year, and transfers students to their next year Schools/Grade Levels.

This article details the steps (both required and recommended) to prepare for running the End of Year (EOY) process.

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**Permanently Store All Grades**

* Start Page > System Reports > Permanently Store Grades
* Verify that grades were stored for all terms at your school
* Once you close out a year by running EOY, you will be unable to use Permanently Store Grades to store current grades from that year.

**Validate Student/School Enrollment Dates**

Run the following reports and correct any students or enrollments that appear.

* Start Page > System Reports > School Enrollment Audit
* Start Page > System Reports > Section Enrollment Audit

Note: If you committed next years schedule before running EOY, next years class enrollments will appear in the class enrollment audit.  This is normal and can be ignored.

**Verify Correct Number of Registered Students**

* Search preregistered students using /enroll\_status=-1 (id 5967)
* Search for inactive students using /enroll\_status=1
* Inactive students should go to the holding school

**Print out School Year Specific Reports**

Some reports  will only return accurate results if run for the students most current school enrollment.  This is often the case in State/Province specific reports.

It is better to be cautious, and print out any important reports for the year before you go through with EOY.  It’s also a good idea to archive these reports as paper, historical backups for later.

We recommend:

* Universal Attendance Report 9 Quarters (current year)~ These reports need to be printed while the student is still at your school
* Universal Attendance Report 9 Trimester (current year)
* QuickLookup attendance if needed for High School Students
* Schools with non standard setups have reports that are similar
* Historical grades Student Screen (only if student is not returning to your school)
* Transfer info student screen (only if student is not returning to your school)
* Student demographics Screen or similar report such as Diocese Enrollment Emergency Record (only if a student is not returning)

**Run School EOY Validation Report**

* Go to system reports/System
* Under MBA EOY reports run the School EOY Validation report
* This report will let you know if you have completed Years and terms and next school and next grade for all students and FTE’s for all grades.

**Required - Year Term For All Schools**

The date ranges for the year term are used to determine what the Entry and Exit dates for student school enrollments created by the EOY process.

At each, and every school that will have students enrolled next year:

1. Go to Start Page > School Setup > Years and Terms
2. Create the upcoming school year.

**Note:** Many school setup items (Such as Attendance Codes) are copied year-to-year when a school year is created this way. Create the upcoming year term at each school, even if the years and terms have already been created in PowerScheduler.

1. If schools want to use similar sections and classes next year they will copy the Master Schedule from the System menu.
2. Create Terms you give grades for (Quarters/Trimesters/Semesters)
3. You must correct the guesses with actual dates BEFORE the dates start

**Required - Next School Indicator**

1. The Next School Indicator value for a student determines which school the EOY process will move the student to.
2. All active students must have a Next School Indicator assigned.
3. Field name is Next\_school
4. See <https://support.powerschool.com/article/11286> for detailed instructions.

**Required - Next Year Grade**

The Next Year Grade value for a student determines which grade level the EOY process will move the student to.

All active students must have a Next Year Grade value assigned. Field name is Sched\_NextYearGrade

See <https://support.powerschool.com/article/11336> for detailed instructions..

**Recommended - Activities**

All student activities are automatically carried over during the End of Year process.

Student activities can be cleared using the Clear Activities function at Start Page > System Administrator > Clear Activities.

**Required - Default Grade Levels for FTEs**

Full Time Equivalencies have checkboxes for every Grade Level at the school they are created at.

These boxes tell the End of Year Process which FTEs to assign to students based on their Next Year Grade Level

All FTEs should be reviewed, at all schools where students will be enrolled next year, to ensure these Checkboxes are checked for the correct FTEs/Grades

1. Navigate to: Start Page > School Setup > Full-Time Equivalencies (FTE) > [The name of the FTE]
2. Check the box for any Grade Level that should have this FTE automatically assigned to it by the EOY process

**Recommended - Schedule**

Schools which use PowerScheduler should schedule students before running the End of Year process.

If this can not be done, see <https://support.powerschool.com/d/9687> for the steps necessary to use PowerScheduler after EOY is complete.

**Recommended - Meal Transactions**

**New for MBA Café –transactions are now archived during EYO. Schools may still wish to take the following steps as a snapshot of current balances.**

1. **All students not returning to your schools should have a $0 balance before moving to the holding school.**

The End of Year process clears all meal transaction records.

Prior to running the End of Year process, check in with your Lunch Staff and confirm they have completed all Meal Transaction Reporting for the year.

You may wish to export all records from the manager screens so the lunch staff can review this information after EOY. From the Start Page choose MBA Cafe from the Left Hand Menu

1. From the café reports page click on Transaction Detail Report
2. Choose options –From start of school year
3. Export File as CSV
4. Save File somewhere you can access it and open in a spreadsheet program