



W S I P C

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WSIPC Guide to Student Year End Processing

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About This Guide

This Guide helps anyone who closes out the current school year and rolls Student Records forward to the next school year, including staff at high schools, middle schools, and elementary schools. This Guide also helps district personnel who are responsible for performing Student Year End Processes.

Each Entity must perform Student Year End Processing to ensure that data is correctly retained in the current school year and then rolled to the next school year.

The list below outlines general activities surrounding Student Year End Processing. This Guide explains these activities in detail.

Performing Module-Specific Student Year End Processes

If your district uses the Special Education module or has Entities that use the Food Service, Fee Management, and Gradebook modules, you must perform module-specific Student Year End tasks.

Performing Student-Related Processes

You must prepare student information for Student Year End Processing before you actually run the Student Year End Processes. This preparation includes completing all current year processes and reporting, updating GPA for secondary Entities, and maintaining discipline and attendance information. It also includes reviewing Entry/Withdrawal Codes and updating Entity Counts.

Confirming Backups and Locking the System

After you prepare the data, you must confirm there is a backup of your database to ensure that the data is safeguarded. You must lock the system to prevent activity during Student Year End Processing.

Running the Student Year End Wizard

After you prepare all student information for the closing of the current school year, the Student Year End Wizard walks you through several processes.

Performing Year Start Activities

Once the Student Year End Wizard finishes, you perform a variety of Student Year Start activities.

Performing Module-Specific Year Start Processes

After you complete the core Student Year Start activities, if your district uses the Special Education module or has Entities that use the Food Service, Fee Management, and Gradebook modules, you must perform module-specific Student Year Start tasks.

What You Should Know Before You Start

You'll find that this Guide is much more helpful if you are familiar with all of the information in the *WSIPC Guide to Skyward's School Management System*, which discusses the software's basic features.

Be Sure You're Signed In

This Guide is intended to be read while you are working in Skyward's School Management System, so be sure you are signed in. Many of the procedures and concepts discussed in the Guide are best understood if you practice as you read.


How to Use This Guide

This section shows you how to follow navigation paths in a Guide, and how to navigate around the Guide using various features. This section also describes how and when screen shots are used in the Guide.

Navigation Paths

The procedures in this Guide begin with navigation menu paths. Select the Display Navigation Menu Paths check box in User Preferences to ensure that you can follow these paths. The option is not available in User Preferences if it is already enabled for the entire district. To learn more about setting User Preferences, see the *WSIPC Guide to Skyward's School Management System*.

Getting Around

If you're using this Guide electronically, you can click any text in blue font to move to the section of the Guide that the text refers to. Because the Guides are published in PDF format, you can also use the PDF navigation pane to quickly move from one section to another. If the pane is hidden, click the Bookmark button  in the menu bar on the left side of the screen.

Screen Shots

You'll find screen shots throughout the guide to help you learn how to use the software. The data entered in the screen shots in this Guide is an example of the data you might enter. These screen shots are updated with each edition to make sure what you see on your screen matches what you see in the Guide. To prevent the Guide from becoming a lengthy picture book, WSIPC Guides use screen shots only to

help illustrate a key idea or when options on a screen are described. This allows WSIPC Guides to be effective *and* concise.

What's in a WSIPC Guide

WSIPC Guides are designed to provide readers with everything they need to know to safely and effectively use Skyward's software. WSIPC strives to make Guides that address the diverse needs of these audiences. Therefore, this Guide doesn't contain information customized for specific audiences, districts, or schools.

If you need to create educational materials that address the specific needs of your Service Center or district, consider using this Guide as a starting point for developing your own customized materials.

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What's New in This Edition

This section highlights the significant changes to the Guide since the last edition such as content about new features, important notes and cautions, and sections of the Guide that have been expanded or moved.

Description of Change	Page #
Updated the Guide to reflect WSIPC's March 2024 software release, version 05.24.02.00.05	N/A
Updated all year references	N/A
Added section on Changing the Current Year Food Service End Date	9
Updated information on selecting a Start Date for running Food Service Year End	9
Added section on Inactivating Students Not Enrolled	36
Added Inactivating Students Not Enrolled to Year End Checklist	142

Processing Food Service Year End

You do not need to run Student Management Year End prior to running Food Service Year End. However, once you run Food Service Year End and confirm that the Start Date and End Date boxes in the Food Service Configuration accurately reflect the next school year, all Food Service processes are recorded in the next school year. This includes Direct Certification Imports and entering new applications.

Note The Start Date of the next school year will be the date used when processing Food Service Year End, and the End Date should reflect September 1st of the following year.

Best Practice You do not have to lock Student Management to process Food Service Year End. However, you should confirm that no one is using the Food Service module while you are processing Food Service Year End.

The items covered in this section require action when processing Food Service Year End. Many of these items do not contain detailed procedures in this Guide. To learn more about these items, see the *WSIPC Guide to Food Service Administration and Management*.



Caution All Food Service processes for the current year must be completed before you run Food Service Year End. After you run Food Service Year End, you cannot update Purchase and Payment Records for the previous year.

In addition, depending on how your district chooses to process the Food Service Year End Utility “Keep This Year’s Purchases and Payments,” you may not be able to access purchase and payment reports for previous years.

Correcting Abandoned Online Payments

If your district accepts online payments through Family Access using a third-party vendor, it is good business practice to check for any abandoned online payments prior to processing Food Service Year End. This assures that all payments are posted in the correct school year. Running the Update Abandoned Online Payments Utility corrects any abandoned online payments.

To correct abandoned online payments:

1. Go to Student Management\Families\FM Setup\UT\UA.
2. Enter a date in the Payment Date Low and High boxes.

Note The dates you enter in the Payment Date Low and High boxes should encompass the entire Food Service School Year. This ensures that the software looks for any payments that may have been abandoned throughout the year.

3. Click Run.

Note The report this utility generates shows all online payment transactions. The records for which a payment has been applied to the student's account are labeled Successful and show an order number and confirmation number. If no records are labeled Successful, this means the utility merely cleared out transactions that were created when a guardian did not complete a transaction.

4. Click Finish.
5. Food Service payments that have been imported successfully create a Payment Record that is in Batch Status. To post payments to the student's Food Service account, run the Batch Update of Payments Utility.

Note If the non-payment problem was already discovered, and payments have been manually added to the student's account to reflect the online payment, you can delete the new record from the Food Service Batch Update of Payments Preview prior to updating.

Processing Current Year Food Service Purchases and Payments, and Updating Payors

You must update all current year purchases and payments before you can run Food Service Year End.

Note If any purchases or payments remain in Batch Status, the Food Service Year End Process menu item is not available.

If your district uses Family Accounts, you must also make sure there are no Customers who have changed Payors that need to be updated. You can use the Update Customers Payor (Outside Food Service) Utility to check for these Customers. To learn more about these processes, see the *WSIPC Guide to Food Service Administration and Management*.

To process current year Food Service purchases and payments, and to update Payors:

1. Go to Student Management\Food Service\FS Setup\UT.
2. Run the Batch Update of Purchases Utility to update Batch Purchases.
 - Run the utility for all Cafeteria Codes.
3. Run the Batch Update of Payments Utility to update any Batch Payments.
 - Leave the date ranges wide open, and run the utility for all Cafeteria Codes.
4. If your district uses Family Accounts, run the Update Customers Payor (Outside Food Service) Utility to view and update Customers that have changed Payors outside of Food Service.

Printing Hard Copies of Reports

Many current year Food Service Reports are not available after you run Food Service Year End. To ensure current year reports are stored for auditing purposes, print any reports you want to archive for the current school year prior to processing Food Service Year End.

Recommended Reports:

- Payor Balance Summary Report
- Sales Summary Report
- Item Purchases by Customer/Date Report
- Payment Transaction Log
- Purchase Transaction Log

Best Practice The reports listed above are recommendations only. You may want to save additional reports based on your district's business practices. If you have not run these reports monthly throughout the school year, run them for the entire year at this time.

In addition, if your district did not select the **Keep Transaction Log Records for 7 Years Before Purging During Year End Process** option on the **Food Service Configuration** screen (Student Management\Food Service\Fs Setup\CF\Fs\Audit Options), run the following reports:

- Item Purchases by Customer/Date Report
- Payment and Purchase Transaction Logs Report (with the School Year, Payment or Purchase Date, and Transaction Date ranges set to encompass the entire current school year)

Tip: Larger districts may consider generating these Reports in smaller ranges for quicker Processing.

These reports are large, so save them electronically instead of printing them.

To print reports:

- Go to Student Management\Food Service\Fs\RE.

Verifying the School Year

Before you run Food Service Year End, verify that the school year is set to the school year you are closing out.

To verify the school year:

1. Go to Student Management\Food Service\Fs Setup\CF\Fs.
2. Confirm that the **School Year** box in the upper-left corner of the **Food Service Configuration** screen contains the correct year.
3. Click **Save**.

Verify Required Number of Years for Record Retention

Before you run Food Service Year End, verify that the number of years your district wishes to retain transaction logs is entered in the Required Number of Years for Record Retention box.

To verify the Required Number of Years for Record Retention:

1. Go to Student Management\Food Service\Fs Setup\CF\Fs.
2. Confirm that the Required Number of Years for Record Retention box on the Food Service Configuration screen contains the number of years the district wishes to retain transaction logs.
3. Click Save.

Running the Food Service Audit

Running the Food Service Audit corrects Payment and Purchase balances, and ensures all balances are accurate before Food Service Year End is processed.

To run the Food Service Audit:

1. Go to Student Management\Food Service\Fs Setup\UT\AU\Fs.
2. Click Add, or select an existing template and click Edit.
3. Leave the Payor Key Low and High range wide open to process all records.
4. Select all of the following check boxes:
 - Update Payor YTD Purchases from Purchases Table
 - Update Payor YTD Payments from Payments Table
 - Update Summary YTD from Purchases Tables
5. Click Save and Run. Records that appear on the report have been updated.

Changing the Current Year Food Service End Date

Before you run Food Service Year End, change the End Date of the current Food Service Year to one day prior to the date Food Service Year End is run (For example, if you're running Food Service Year End on June 26, the current year Food Service End Date should be set to June 25).

To change the Current Year Food Service End Date:

1. Go to Student Management\Food Service\Fs Setup\CF\Fs.
2. Enter the appropriate date in End Date.
3. Click Save.

Running Food Service Year End

Food Service Year End automatically preserves the purchases, payments, balances, and audit trail for the school year.

To run Food Service Year End:

1. Select Entity 000 at the top of the screen.
2. Go to Student Management\Food Service\Fs\YE\YE. The Step 1 of 2: Year End Preliminary Processing screen appears listing the steps that will be performed.

Note	Database Backup has been completed may be selected, but it is not a required step and will not prevent you from continuing. To learn more about database backups, see "Confirming the Existence of Backups" (page 48).
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- In the ##### - ## Start Date box, enter the date you want the next Food Service Year to start. The Start Date must be today's date unless Food Service Year End was not run prior to the start of the next school year. It's important to not leave a gap between the end of one FS year and the start of the next, so that all purchases & payments are correctly assigned to a FS year.

Note The date entered in the ##### - ## Start Date box will populate the Start Date in the Food Service Configuration. For example, if you run Food Service Year End on 6/26/2024 and use this date as the 2024-25 Start Date, the Food Service Configuration Start Date will be set to 6/26/2024.

Note If necessary, Start Dates *can be backdated* to correct an issue where Food Service Year End was not run prior to the start of the next school year.

For example, today is 9/10/2024 (part of the 2024-25 School Year), and the district is still running in the 2023-24 Food Service Year in error. You can run Food Service Year End using a 2024-25 Start Date of 8/1/2024. In this scenario, Food Service Purchases and Payments made on or after the selected Start Date of 8/1/2024 are moved into the 2024-25 Food Service Year.

3. Click Continue.
4. Click OK to confirm that you want to begin Step 1 of the Year End process.

Note You must leave the Food Service Year End box open while Step 1 is processing through the print queue.

5. The Audit of Payments and Purchases Report appears. Do one of the following:
 - If no Payor Records appear on the Audit of Payments and Purchases Report, go to step 7.
 - If Payor Records appear on the Audit of Payments and Purchases Report, do the following:
 - i. Print or save a digital copy of the report of updates.
 - ii. Close the report. The "Continue Food Service Year End" message appears.
 - iii. Click Continue.
6. The Step 2 of 2: Complete Year End Process screen appears. To begin Step 2, do one of the following:

- To keep this year's purchases and payments, do the following:
 - i. Select **Keep this Year's Purchases and Payments**.
 - ii. Click **Process**. The following message appears:

"You have specified that you wish to keep purchases and payments. This will cause next year's processing to be slower and use more disk space. Do you wish to continue?"
 - iii. Click **Yes**.

Tip Keeping the Purchase and Payment Records can help if your district is audited. Many districts keep purchases and payments during the Year End processes and delete them sometime after the beginning of the school year.

- If you choose *not* to keep this year's purchases and payments, do the following:
 - i. Click **Process**. The following message appears:

"The Year End Process cannot be cancelled once it is started. Are you sure you would like to continue?"
 - ii. Click **Yes**.

7. After processing Year End, the "Complete Food Service Year End Process has finished processing" message appears. Click **View Report**.
8. Review and print the Year End Process Report. This data can also be viewed through the Year End Status Report (Student Management\Food Service\FY\YE\YY). To learn about this report, see "[Viewing the Food Service Year End Status Report](#)" below.

Note The Food Service Configuration Year is advanced one year, and the Start and End Dates are auto-set during the Food Service Year End process spanning more than a year.

The Food Service Start Date is set to the date the Food Service Year End was processed, and the End Date is set to September 1st of the following school year.

This completes Food Service Year End Processes.

Viewing the Food Service Year End Status Report

After you complete Food Service Year End, the Year End Status Report is updated with the following information:

- Last Run Date
- Option processed
- Number of records processed
- Date and time Food Service Year End was started and finished
- Done (completed)
- Name of the person who ran the utility
- Which options were processed

Note You can run this report any time during the year or for previous years to determine who ran the process and/or which options were selected.

To view the Food Service Year End Status Report:

1. Select Entity 000 at the top of the screen.
2. Go to Student Management\Food Service\FY\YE\YV.
3. Select the appropriate year in the School Year box and click Run.

Finishing Food Service Year End Processing

To ensure that Student Records contain accurate Food Service information for next year, there are specific tasks you must run *after* the Student Year End processes are completed. To learn more about these tasks, see "[Processing Food Service Year Start](#)" (page 87).

Processing Fee Management Year End

The Fee Management Year End Process rolls Fee Management Records to the next school year and closes out the books for the current school year. The following section explains five items that require action before processing Fee Management Year End. If you are using e~Funds for Schools, see "[e~Funds for Schools Year End Process Considerations](#)" (page 17).

Best Practice	Although you can perform the Fee Management Year End Process before or after running the Student Year End Wizard, it is best practice to complete this process immediately before running the Student Year End Wizard.
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Best Practice	You do not have to lock the system to process Fee Management Year End. However, you should confirm that no one is using the module while you are processing Fee Management Year End. If you are using a third-party software, coordinate the same downtimes.
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Verifying the School Year

Before you run Fee Management Year End, verify that the school year is set to the school year you are closing out. Verifying that the school year is correct is important because you can mistakenly process Fee Management Year End more than once without receiving an error message.

To verify the school year:

1. Go to Student Management\Administration\FM Setup\CF\FM.
2. Confirm that the School Year box in the upper-middle part of the Fee Management Configuration screen contains the correct year.
3. Click Save.

Cloning Bill Codes

You must clone Bill Codes from the current school year to the next school year before you can run Fee Management Year End. You clone Bill Codes by running the Clone Data to School Year Utility.

Note A Bill Code with a Prorate Schedule assigned to it will not clone into the next year unless you either remove the Prorate Schedule or create a Prorate Schedule with the same name in the next year. To learn how to add Prorate Schedules, see "Adding a Prorate Schedule" in the *WSIPC Guide to Fee Management*.

To clone Bill Codes:

1. Go to Student Management\Administration\FM Setup\UT\CD.
2. Confirm that the School Year Selection box is set to Current to Next.
3. Click Bill Codes and select one of the following:
 - Overwrite existing codes with cloned data
 - Only add codes that don't exist in next year
4. Confirm that the Default Bill Codes check box is selected.
5. Click Clone.
6. A summary of items being cloned appears. Click Clone or Cancel if necessary.

Note The Clone Data to School Year Utility includes the ability to clone Bill Codes, Activity, Course and Grad Year Fees and Fee Groups. Additionally the Customer Cloning Options, include Customer Affiliations, Customer Organizations, and Customer Tuition Types.

Printing Hard Copies of Reports

Many current year Fee Management Reports are not available after you run Fee Management Year End. To ensure current year reports are stored for potential auditing purposes, save and/or print any reports you want to archive for the current school year prior to processing Fee Management Year End.

Recommended Reports

- Billing Detail Report
- Print Statements (by Range)
- Fees Paid Report
- Print Invoice by Range

To save PDF copies or print hard copies of reports:

- Go to Student Management\Administration\FM\RE.

Correcting Credit Balances

Before you run the Year End process in Fee Management, it is important to correct existing credit balances so that those credit balances are not carried forward into the next school year.

The Apply Credit Balance Utility finds Customer accounts that have a credit balance and outstanding charges, and applies the credit balance to the outstanding charges. You can choose which Bill Codes you want the Credit Balance applied towards and the order of the Bill Codes that the credit balance is applied in.

To correct credit balances:

1. Go to Student Management\Administration\FM Setup\UT\CB.
2. Run the Apply Credit Balance Utility.
3. Go to Student Management\Administration\FM\RE\CB.
4. Run the Credit Balance Report to identify any Customer accounts that still have a credit balance after you have run the Applied Credit Balance Utility.

Note	These accounts are owed money from the school district. No matter what process your district takes in issuing a refund check, you must modify the Customer's Fee Management account to reflect the refund being issued, and you must bring the credit balance to zero. To learn more go to the <i>WSIPC Guide to Fee Management</i> .
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Correcting Abandoned Online Payments

Before processing Fee Management Year End, you must correct any abandoned online payments. This applies only if you allow online payments to be made through Family Access using a third-party vendor. If you use a third-party vendor, you must run the Update Abandoned Online Payments Utility to verify that there are no abandoned Payment Records.

To correct abandoned online payments:

1. Go to Student Management\Families\FM Setup\UT\UA.
2. Enter a date in the Payment Date Low and High boxes.

Note	Dates entered in the Payment Date Low and High boxes should encompass the entire Fee Management School Year. This ensures that the software looks for any payments that may have been abandoned throughout the year.
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3. Click Run.

Note	The report this utility generates shows all online payment transactions. The records for which a payment has been applied to the student's account are labeled Successful and show an order number and confirmation number. If no records are labeled Successful, this means the utility merely cleared out transactions that were created when a guardian did not complete a transaction.
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4. Click Finish.
5. Fee Management payments that have been imported successfully create a Payment Record.

Note	If records appear in red, they must be reconciled before processing Fee Management Year End. See "Using Tracking Logs" in the <i>WSIPC Guide to Fee Management</i> .
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e~Funds for Schools Year End Process Considerations

e~Funds for Schools is a third-party Point of Sale software which integrates with Skyward's School Management System to seamlessly allow districts to accept and post payments to a student's account in Skyward's School Management System. To learn more about e~Funds for Schools go to the following website:

<http://www.e~Fundsforschools.com/>

Alternatively, you can contact e~Funds Customer Service at 866-770-5856 or efs@mvpbanking.com.

Best Practice	Coordinate with e~Funds for Schools to create a downtime so users cannot enter payment information while the Year End process is occurring.
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Consider the following before running Fee Management Year End if you are using e~Funds for Schools:

1. Process Fee Management Year End immediately before processing Student Year End. This prevents the Fee Management school year from being out of sync with the Student Management school year.
2. Set the School Month box in the Fee Management Configuration to coincide with the month when e~Funds payments will commence.

Note	If payments commence in August, you must set the School Month box to 8.
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3. If your district uses the Update to General Ledger for Fee Management, your Finance office may require Fee Management Reports from the end of previous school year and the beginning of the next school year to reconcile Financial Management Reports. This is because the Financial Management System does not change years until September.

Processing Account Balances

As part of the Fee Management Year End Process, you have two options to process account balances. If you choose to move Fee Detail Records into the next school year, past due amounts appear as *separate* line items. Or, if you choose to create

Arrears Records in the next school year, all past due amounts *consolidate* into a single line item. This section details each process.

Note If the Update To The General Ledger has been enabled in Fee Management Configuration option (Student Management\Administration\FM Setup\CF\FM\General Ledger Setup) is selected, you must update all fee activity before you can process Year End.

Option 1: Moving Fee Detail Records to the Next School Year

Moving Fee details to the next school year during Fee Management Year End moves every charge with a balance in the Customer's current school year account to the next school year. If you choose to move Fee Detail Records into the next school year, past due amounts appear as *separate* line items.

Note This option works for districts that are configured to Bill by District.

This process does the following:

- Moves current school year charges to the next school year if the charges have a balance
- Changes any Pre-paid Records to Payment Records
- Changes the School Year on the Configuration screen to the next school year

To move Fee Detail Records to the next school year:

1. Go to Student Management\Administration\FM Setup\CF\FM.
2. Select Cash Basis next to Accounting System.
3. Click Save.
4. Go to Student Management\Administration\FM\YE.
5. To reset Customers' Waivers to No during Year End, select the Reset all waiver flags for customers in this entity to Not Waived check box.

Note If your district's Accounting System is not set up as a Cash Basis, return to Student Management\Administration\FM Setup\CF\FM and set the Accounting System option to Accrual.

Option 2: Creating Arrears Records in the Next School Year

Creating Arrears Records in the next school year during Fee Management Year End takes the unpaid balance from the Customer's current school year charges and brings that total into the next school year as a single line item. If Arrears Records are brought forward, you can click the History button on the Customer's account to see the detail that comprises the Arrears balance.

Best Practice	Add an Arrears Bill Code to the Bill Codes Table for the next school year before you run Fee Management Year End.
Note	This option is useful if your district is configured to Bill by District, and if you run Fee Management Year End from Entity 000.

To create Arrears Records in the next school year:

1. Select Entity 000 at the top of the screen.
2. Go to Student Management\Administration\FM Setup\CF\FM.
3. Select Accrual next to Accounting System.
4. Click Save.
5. Go to Student Management\Administration\FM\YE.
6. In the Arrears Code box, enter your Arrears Bill Code.

Note	If your district uses the Childcare module, there is a separate check box (the Create separate arrears for childcare fees (from childcare bill codes setup) check box) that you can select. If no Childcare Arrear Code is specified, the arrears amounts of the Childcare fees are included in the regular Fee Management Arrears Records.
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7. In the Due Date for Arrears box, enter the date the Arrears Records are due.
8. To reset Customers' Waivers to No during Year End, select the Reset all waiver flags for customers in this entity to Not Waived check box.

Running the Fee Management Year End Process

After you follow the previous processes and prepare your database, you are ready for the final step of running the Fee Management Year End Process.

The Fee Management Year End Process does the following:

- Creates Arrears Records for all unpaid balances
- Changes any Pre-paid Records to Payment Records
- Changes the School Year on the Configuration screen to the next school year

To run the Fee Management Year End Process:

1. Select Entity 000 at the top of the screen.
2. Go to Student Management\Administration\FM\YE.
3. Click Run. The "Verify Year End Update" message appears.
4. Click Yes.

A report appears stating that the Fee Management Year End Process is complete.

Processing Special Education Year End

This section explains the two processes you must perform when completing Special Education Year End: cloning Special Education Staff and cloning District Services.

These processes must only be run if your district enters and maintains Placements on students' IEP Record in Skyward's School Management System.

Each process is described below.

Best Practice	You do not have to lock Student Management to process Special Education Year End. However, it is best to confirm that no one is using the Special Education module while you are processing Special Education Year End.
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Cloning Special Education Staff

The Clone Staff Utility copies Special Education Staff, and any assigned services and students, from one school year to another school year. The utility can *create* Staff Records for a particular school year and it can also *update* Staff Records for a particular school year.

Special Education Staff and District Services are combined to make the Placements added to a student's IEP. When an IEP is entered on a student, the IEP dates can span two school years, the current and next school years. If you also enter Placements on that IEP, Special Education Staff and District Services must exist in both the current and next school years.

Part of the Year End process for districts that use Placements is to verify that your Staff and District Services tables exist in the correct school years. The upcoming school year was likely cloned in the previous Year End process, but it is important to keep in mind that two years of tables need to be created when Placements are being used. Verify that both tables are created and up-to-date with the most current information available.

Example If the current school year is 2024 and Special Education Staff Records exist for 2025, you can clone the 2025 Staff Records to create the Staff Records for 2026.

If Special Education Staff Records do not exist for 2025, you can run the Clone Staff Utility twice. Once to clone Special Education Staff Records from 2024 to 2025 and a second time to clone them from 2025 to 2026.

Best Practice The best time to run the Clone Staff Utility is *after* you make all the necessary staff changes to the Special Education Staff table you are going to clone. If you don't make the updates prior to cloning, you will need to make them manually in both the 2025 and 2026 Special Education Staff tables.

To clone Special Education Staff:

1. Go to Student Management\Student Services\SE Setup\UT\CS.
2. In the School Year box, enter the school year associated with the Staff Records you want to clone to another year.

Note To clone all Staff Records, do not update the District Code and Staff Alphakey boxes.

3. In the New School Year box, enter the school year associated with the Staff Records you are creating or updating.
4. Select the Clone Assignments box.

Important Select the Clone Assignment box to ensure that Staff assignments to District Services and to the students enrolled in those services are not lost.

5. Do the following:
 - a. In the New Assignment Start Date box, enter the first day in the next school year when the Special Education Staff will provide assigned services.
 - b. In the New Assignment End Date box, enter the last day of the next school year when the Special Education Staff will provide assigned services.

Note The New Assignment Start Date and New Assignment End Date are typically aligned with the first day of school and the last day of school for the specific school year.

Enter an approximate date if the exact date is unknown at the time you are running the utility. You can run the Update Service/Program Dates Utility to mass change the District Services and Staff Assignment Dates once they are known.

6. Click Run. The Clone Staff Summary screen displays all the staff members who will be cloned to the next school year.

7. Click Process.

Cloning District Services

The Clone District Services Utility copies District Services from one school year to another school year.

District Services and Special Education Staff are combined to make the Placements added to a student's IEP. When an IEP is entered on a student, the IEP dates can span two school years, the current and next school years. If you also enter Placements on those IEPs, District Services and Special Education Staff must exist in both the current and next school years.

Part of the Year End process for districts that use Placements is to verify that your Staff and District Services tables exist in the correct school years. The upcoming school year was likely cloned in the previous Year End process, but it is important to keep in mind that two years of tables need to be created when Placements are being used. Verify that both tables are created and up-to-date with the most current information available.

Example If the current school year is 2024 and District Service Records exists for the next school year of 2025, you can clone the 2025 District Service Records to create District Service Records in the 2026 school year.

If District Service Records do not exist for school year of 2025, you can run the Clone District Services Utility twice. First, clone the 2024 District Service Records to create District Service Records in school year 2025. The second time, clone the 2025 District Service Records to create District Service Records in school year 2026.

Best Practice The best time to run the Clone District Service Utility is after you make all the necessary changes to the District Service Records you are going to clone, but before adding IEPs to students in the next school year.

Otherwise, your IEPs won't have Placement Records for both school years 2025 and 2026.

Note If you run the Clone District Service Utility prior to running the Clone Staff Utility, the Primary Teacher box is filled with Teacher Not Assigned for all District Service Records.

If this happens, run the Clone Staff Utility and select the Clone Assignments option. The New Assignment Start and End Dates must match the start and end dates of your District Services for the next school year.

To clone District Services:

1. Go to Student Management\Student Services\SE Setup\UT\CD.
2. In the School Year box, enter the school year associated with the District Service Records you want to clone to another year.

Note To clone all District Services, do not update the District Code, Service, Program Number, and Sequence Number boxes.

3. In the New School Year box, enter the school year associated with the District Service Records you are creating or updating.
4. Do the following:
 - a. In the New Begin Date box, enter the date the District Services will begin for the school year reflected in the New School Year box.
 - b. In the New End Date box, enter the date the District Services will end for the school reflected in the New School Year box.

Note

The New Begin Date and New End Date boxes are typically aligned with the first day of school and the last day of school for the specific school year.

Enter an approximate date if the exact date is unknown at the time you are running the utility. You can run the Update Service/Program Dates Utility to mass change the District Services and Begin and End Dates once they are known.

5. If District Service Records exist in the next school year, and you want to update them to the new values, select the **Overwrite Existing Records** check box.
6. Click **Run**. The **Clone District Services Summary** screen appears and displays all the district services that will be cloned to the next school year.
7. Click **Process**.

Processing Gradebook Year End

You can perform Gradebook Year End processes before or after you run the Student Year End Wizard, with the exception of deleting Gradebook Score Change History. Complete the Delete Gradebook Score Change History process *after* the Student Year End Wizard is run. See "[Mass Delete Assignment/Event Grade Change History](#)" (page 103) to learn more about this process.

Best Practice	You do not have to lock the system to process Gradebook Year End. However, you should confirm that no one is using Secondary and Standards Gradebooks while you are processing Gradebook Year End.
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Note	For recommendations of reports to run for Gradebook Records retention, see " Appendix A - Recommendations for Gradebook Records Retention " (page 130).
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Gradebook Year End includes cloning codes and groups to the next school year, and reviewing Grading Setup and GPA Setup for schools that use Gradebook. This section discusses both processes.

Note	You can also clone these codes during the Student Year End Wizard process.
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Cloning Codes and Groups to the Next School Year

When you clone Gradebook Codes and Groups to the next school year, there are several utilities that you must run by individual Entity, and others that can be run from the district level at Entity 000. This section explains each utility.

Cloning Grade Marks and Grade Comments from Year to Year

You must clone Grade Marks and Grade Comments from year to year for each Entity.

To clone Grade Marks from year to year:

- Go to Student Management\Office\GR Setup\UT\CC\GM\YY.

To clone Grade Comments from year to year:

- Go to Student Management\Office\GR Setup\UT\CC\GC\YY.

Cloning Category Groups for the Next Year

This utility clones Category Codes and Groups for a single Entity or multiple Entities.

To clone Category Groups for the next year:

- Go to one of the following areas:
 - Student Management\Educator Access Plus\GB\SE Setup\UT\CY.
 - Student Management\Office\YE\YU\EU\SB\CN.

Tip To save time, clone multiple entities at once.

Cloning Grade Mark Groups for the Next Year

This utility clones Grade Mark Groups for a single Entity or multiple Entities.

Note You must first clone Grade Marks before you can clone Grade Mark Groups. To learn more about cloning Grade Marks, see "[Cloning Grade Marks and Grade Comments from Year to Year](#)" (page 27).

To clone Grade Mark Groups for the next year:

- Go to one of the following areas:
 - Student Management\Educator Access Plus\GB\SE Setup\UT\GY.
 - Student Management\Office\YE\YU\EU\SB\CM.

Tip When in a specific entity, you can select all entities.

Cloning Special Codes for the Next Year

This utility is not Entity specific and clones Special Codes for all Entities in the district, regardless of whether you run it from Entity 000 or an individual Entity.

To clone Special Codes for the next year:

- Go to one of the following areas:
 - Student Management\Educator Access Plus\GB\SE Setup\UT\SY
 - Student Management\Office\YE\YU\EU\SB\SY

Cloning Semester/Final Default Formulas for the Next Year

This utility can be run for both Secondary and Standards Gradebooks. It clones Semester/Final Default Formulas for a single Entity or multiple Entities.

To clone Semester/Final Default Formulas for the next year:

- For Secondary Gradebook, go to one of the following areas:
 - Student Management\Educator Access Plus\GB\SE Setup\UT\CS
 - Student Management\Office\YE\YU\EU\SB\DF
- For Standards Gradebook:
 - Go to Student Management\Educator Access Plus\GB\ST Setup\UT\DF

Reviewing Grading Setup and GPA Setup for Schools That Use Gradebook

The best time to build or modify the Grading Setup and GPA Setup for an Entity that uses Gradebook, is during the Future Year Scheduling processes. However, Student Year End is a good time to review the Grading Setup and GPA Setup for each Entity that uses Gradebook.

An Entity's Grading Setup and GPA Setup significantly affect how Gradebook looks and functions. Once you post grades from Gradebook, it is often too late to correct Grading Setup and GPA Setup problems. If you are concerned that the Grading Setup and GPA Setup may not work with your Gradebook, please contact your Student Support staff for help.

To review the Grading Setup for schools that use Gradebook:

- Go to Student Management\Office\GR Setup\CF\GS.

To review the GPA Setup for schools that use Gradebook:

- Go to Student Management\Office\GR Setup\CF\GP.

To learn more about Grading Setup and GPA Setup, see "Grading Setup" and "GPA Setup" in the *WSIPC Guide to the Grading Cycle and Configuration*.

Preparing Data before Running the Student Year End Wizard

Although some areas of Skyward's Student Management System do not have specific year-end processing, it is best to have data up-to-date before ending one school year and starting the next. Before the Student Year Processes are started, there are tasks that you must complete in the current school year. You can access the following modules or areas within Skyward's Student Management System to perform these tasks:

- District Year End Configuration
- Student Demographics
- Attendance
- Grading
- Activities
- Textbook
- Student Obligations
- Scheduling

This section describes the specific tasks for each area.

Configuring District Year End

There is a Year End Configuration that allows a blank NY Homeroom to overwrite the CY Homeroom during the Year End final process.

When Districts have data in both the NY Homeroom and CY Homeroom boxes (Student Management\Students\ST\PR\Entity\Entity Info), the Student Year End Processes step of the Year End Wizard copies the NY Homeroom value to CY Homeroom. However, if NY Homeroom is blank and the CY Homeroom is not blank, the CY Homeroom values are not overwritten with the NY Homeroom value of blank.

If you do want to overwrite CY Homeroom data and bring the NY Homeroom data forward to CY Homeroom during the Year End Process, you must set the District Year End Configuration option.

Note	Depending on your district's business practice, you may or may not want to overwrite the CY Homeroom value with a blank during the Student Year End Process.
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To configure District Year End:

1. Go to Student Management\Office\YE Setup\CF\YE.
2. Select Allow a Blank NY Homeroom to Overwrite CY Homeroom During the Year End Final Process.
3. Click Save.



Caution

This option affects the entire district, so verify that all Entities want to copy a blank NY Homeroom to CY Homeroom during the Year End Final Process.

Preparing Student Demographics

Prior to running the Student Year End Wizard, complete all data entry and corrections for entry/withdrawal and student demographics. Run reports to capture student enrollment information as of the end of the current school year. Some of these reports are run for a single Entity, while others are run at Entity 000.

To learn more about maintaining student demographic and enrollment information, see the *WSIPC Guide to Student Demographics and Families*.

Updating Demographic Information

When closing out the school year, a good business practice is to enter all changes to the student's demographic information that you have received. This starts the next school year with everything as up-to-date as possible. Enter all demographic updates, such as address changes, in accordance with your district's business practices.

Pre-Registering Students

Enter all students you have pre-registered in accordance with your district's business practices. Enter these students with a Current Year Status of Inactive and Next Year Status of Active.

To pre-register students:

- Go to Student Management\Students\ST\PR.

Running the Mass Add Students to an Entity Utility

The Mass Add Students to an Entity Utility may have been run during the Future Scheduling process for scheduled Entities, and you may still need to run it for some Entities, such as elementary schools and any non-scheduled Entities. This process adds students to a new Entity by creating an Entry Record, but it does not delete or withdraw students from the original Entity (students are withdrawn during the Student Year End Process if they are part of the outgoing class for an Entity). To learn more about running the Mass Add Students to an Entity Utility, see “Run the Mass Add Students to an Entity Utility” in the *WSIPC Guide to Future Scheduling: Part One - Preparing to Schedule*.

Note	The Mass Add Students to an Entity Utility is not typically run from the high school because the outgoing class is graduating, not moving to another Entity. However, a high school may run this utility to move students if a new high school is opening or new boundaries require students to transfer to another Entity.
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To run the Mass Add Students to an Entity Utility:

- Go to Student Management\Students\ST Setup\UT\MA.

Marking Students as Advanced or Retained

Each year, based on earned credits or your district business practices, students may be advanced (skipping a grade *and* not changing buildings) or retained (repeating a grade *and* not changing buildings). The Student Year End Wizard creates the necessary Withdrawal and Entry Records if you properly flag the Student Record.

Note	Transitional Kindergarten students moving to regular Kindergarten should have the Retain field set to Yes and the NY Grad Year field set one year greater than the current grad year field when their TK enrollment record was created.
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For TK students promoted to 1st grade, the Retain field should be set to No and the NY Grad Year field should match the current Grad Year field

Best Practice	When students <i>are</i> retained <i>or</i> advanced <i>and are</i> switching buildings, it is best to manually withdraw and re-enroll them.
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To mark students as Advanced or Retained:

1. Go to Student Management\Students\ST\PR.
2. Click the General tab.
3. Click Profile.
4. Click Edit.
5. Do one of the following:
 - To advance a student, change the Advance box from No to Yes.
 - To retain a student, change the Retain box from No to Yes.
6. Do one of the following:
 - To advance a student, *decrease* the year in the NY Grad Year box by one year.
 - To retain a student, *increase* the year in the NY Grad Year box by one year.
7. For students in kindergarten through eighth grade, confirm that the years in the Grad Req Base Yr and WA Grad Yr boxes match the year in the NY Grad Year box.



Caution

Do not change the Grad Req Base Yr or the WA Grad Yr if the student is in ninth through twelfth grade unless special circumstances dictate the change.

8. Click Save.

Withdrawing Students

When you receive notification of withdrawal for a student, follow your district's business practices to ensure that the student is withdrawn.

Note There are special considerations to make when handling Entry/Withdrawal Records at the end of the school year and for shared students. To learn more about recommended procedures, see "[Appendix B - Managing Entry-Withdrawal Records](#)" (page 135).

Running the Retention and Promotion Report

The Retention and Promotion Report lists students who have not obtained the minimum number of credits required to be promoted to the next grade. This report can help you identify students to retain for the next year before you run the Student Year End Wizard.

Note You must be in an Entity other than 000 to access the Retention and Promotion Report.

To run the Retention and Promotion Report:

- Go to Student Management\Office\YE\YU\RE\RP.

Creating the Graduation Date

The Washington State Standardized Transcript includes a graduation month and year. Therefore, you must run the Student Graduation Date Mass Create/Change Utility to mass change the Graduation Date for the graduating senior class before you print transcripts. Run this utility only in high school Entities for the outgoing senior class.

To create the Graduation Date:

1. Go to Student Management\Students\ST Setup\UT\GD.
2. In the Grad Yr/Grade box, enter the year for the senior class in both the Low and High boxes.
3. Next to Status, select Active.
4. Next to NY Status, select Active, Inactive, or Both.
5. Next to Graduated, select No.

6. Next to Retained, select No.
7. Select Set Graduation Month/Day to.
8. In the Graduation Month/Day boxes, type the month and day to reflect the date of graduation.
9. Next to Student Graduated, select Change to Yes.
10. Confirm that the Overwrite Existing Dates is *not* selected.

Note	The Overwrite Existing Dates option is intended for students who are already marked as Graduated Yes but have not been withdrawn. To meet Washington State Reporting requirements, any student who graduates before the end of the school year must already be flagged as graduated <i>and</i> withdrawn.
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11. Click Run.

Reviewing Entry and Withdrawal Codes

Each year, the Student Year End Wizard withdraws the outgoing class of students at an Entity, and also withdraws the graduating class of students. From time to time, state requirements for the use of specific codes may impact the codes you use for such student movement within the district. Therefore, to ensure you use codes that meet the State Reporting requirements, review the Entry and Withdrawal Codes used to identify students entering and leaving the building or district.

Reviewing Entry Codes

Review Entry Codes on a yearly basis.

To review Entry Codes:

1. Go to Student Management\Students\ST Setup\CO\EN.
2. Review Entry Codes used to identify the re-entry of retained or advanced students into the same Entity.
3. Review the code used to indicate students moving to an Entity as the result of being promoted from another Entity.

4. If your district is making a boundary change or closing schools, consider creating an Entry Code to identify these students. Alternatively, use the Entry Code assigned when students move from one Entity to another, and add a comment to track these students.

Reviewing Withdrawal Codes

Review Withdrawal Codes on a yearly basis.

To review Withdrawal Codes:

1. Go to Student Management\Students\ST Setup\CO\WC.
2. Review Withdrawal Codes used to retain or advance students.
3. Review the code used to denote students moving to an Entity as the result of being promoted from another Entity.
4. If your district is making a boundary change or closing schools, consider creating a Withdrawal Code to identify these students. Alternatively, use the Withdrawal Code assigned when students move from one Entity to another, and add a comment to track these students.

Inactivating Students Not Enrolled

Prior to running Year End, districts should ensure that all students who have no active enrollment records in an Entity are marked as Inactive for that Entity. The Inactivate Students Without an Enrollment utility processes these records automatically.

To run the Inactivate Students Without an Enrollment utility:

1. Go to Student Management\Office\YE\YU\IS.
2. If you are running this utility at the District level, do one of the following:
 - a. Select an Entity.
 - b. Click Entities to select multiple Entities.
3. Click Run.

Running Student Enrollment Reports

Each month, districts are required to run Enrollment Reports on Count Day to verify student enrollment. Consider running the Enrollment Reports that your district

requires for student count verification and validation. The following reports can serve as the final picture of your student population at the end of the school year.

- Student Cross-Reference List
- Entry/Withdrawal Report

Best Practice	Run the Entry/Withdrawal Records for all active students who do not have a Withdrawal Record.
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To run Student Enrollment Reports:

- Go to Student Management\Students\ST\RE.

Recalculating Entity Counts

Entity Counts reflect the active students by grade level at each Entity. If viewed at the district level, Entity Counts provide the district's grade level counts. Recalculate these counts to ensure that the counts accurately reflect the active student population at the end of the school year.

Tip	If your district has set the Automatically Update Student Entity Counts to Yes in District Configuration (Product Setup\Skyward Contact Access\ST\CF), it is not necessary to run the Recalculate Entity Counts Utility.
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To recalculate Entity Counts:

1. Go to Student Management\Advanced Features\EC Setup\UT\RS.
2. Confirm that the School Year box contains the current school year.
3. Confirm that the Process From and To boxes contain the graduation years you want to include.
4. Click Run.

Tip	Consider saving the Recount Students Report. It reflects the active student population in your district at the end of the school year.
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Retaining Military Family Information

It is not necessary to have Military Family Special Program Records associated with each school year. However, Military Family Status should be verified on a yearly basis.

To verify Military Family Status yearly, use the Verified On and Verified By boxes to track when the Information is collected. Since these fields will be overwritten each school year, run a report at the end of each year to retain the prior year's Military Family Information.

Best Practice	Run a Data Mining Report and save the report. Include the following fields in the report: Student Name, Grade, Default Entity, Military Family Start Date, Military Family Start School Year, Military Family End Date, Military Family End School Year, Military Family Status, Military Family Verified On, and Military Family Verified By.
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Preparing Attendance

Enter all attendance updates and corrections for the current school year. Run and print Attendance Reports in accordance with your district's business practices. To learn more about maintaining attendance information, running reports, and running utilities, see the *WSIPC Guide to Attendance*.

Running Attendance Reports

Use the Truancy Programs and Petitions Report and the Monthly Quarterly Report to simplify State Reporting of attendance information at the end of the school year. The Truancy Programs and Petitions Report and Monthly Quarterly Report are available for prior school years, but it is common practice to run these reports before running the Student Year End Wizard to include with archived reports and help complete required State Reporting.

Best Practice	Although the Truancy Programs and Petitions Report and the Monthly Quarterly Report are available for prior school years, it is best to run them before Student Year End.
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Truancy Programs and Petitions Report

The Truancy Programs and Petitions Report provides information about unexcused absences and truancy petitions. OSPI requires that districts annually report the number of students enrolled, unexcused absences, and juvenile court petitions (Becca) filed on behalf of students with unexcused absences. Additionally, districts must report on their attempts to correct attendance problems. The Truancy Programs and Petitions Report provides this information.

To run the Truancy Programs and Petitions Report:

- Go to Student Management\Federal/State Reporting\WA\RE\AR\AT.

Monthly Quarterly Report

The Monthly Quarterly Report includes only Absence Type Codes associated with a category of Excused or Unexcused. This report is useful at the end of the school year because it clearly identifies the percent attended for each student as well as for the entire Entity or district. While it is common practice to run this report for each Entity, consider also running the Monthly Quarterly Report from Entity 000. This provides historical information that is date stamped for a school year to use for reference when needed. This can be especially helpful during an audit or when applying for a grant.

To run the Monthly Quarterly Report:

- Go to Student Management\Office\AT\RE\AR\MQ.

Running the Update Attendance History YTD Totals Utility

The Update Attendance History YTD Totals Utility saves student attendance to history, allowing you to run Attendance Reports and view historical attendance on the Student Profile for previous school years.

Best Practice	Running the Update Attendance History YTD Totals Utility before using the Year End Wizard can decrease the amount of time needed to process Attendance Records during Student Year End processing.
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To run the Update Attendance History YTD Totals Utility:

- Go to one of the following areas:
 - Student Management\Office\AT Setup\UT\UY.
 - Student Management\Office\YE\YU\UY.

Preparing Grading Information

Some reports are based on a student's current year grades. Therefore, you can only run these reports in the current school year. Run the Grading Information Reports discussed in this section *before* running the Student Year End Wizard. To learn more about performing specific grading tasks, see the *WSIPC Guide to the Grading Cycle and Configuration*.

Running the Honor Roll Report

The Honor Roll Report shows students for a specific grading period. You can run it in several ways. For example, adjust the GPA range to run a high honors report and a low honors report separately. At the end of the school year, it is useful to report on which students made the honor roll during the last Grading Period of the school year.

To run the Honor Roll Report:

- Go to Student Management\Office\GR\RE\SL\HR.

Running Report Cards

Report Cards show a student's progress and the grades they have received through the course of the year. Run all Report Cards prior to running the Student Year End Wizard. This ensures that the student's Grade Level on the Report Card is accurate.

To run District or Custom Report Cards:

- Go to Student Management\Office\GR\RC\RE\DR or CD.

To run Standards Based Report Cards:

- Go to Student Management\Office\GR\RC\SB\BR or CR.

Note	You can generate Report Cards after you run the Student Year End Wizard, but the Grade Level on the Report Cards may not reflect the Grade Level students were at when they received the grades.
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Updating Historical Grade Calculations and GPA Information

Entities that maintain GPA information must ensure that Historical Grade calculations and Cumulative Current Year GPA values are updated. You must run these processes before running the Student Year End Wizard.

To ensure that these calculations and values are updated for the current year, you can update student GPA, run the Student Rank Report, and run Transcript Labels. Each process is described below.

Updating Student GPA

Running the Update Student GPA Utility is a two-step process. It recalculates the credits, points, and GPA information from the student's grade history, and updates the Current and Historical sub-tabs under the GPA tab in Student Profile.

To update student GPA:

1. Go to Student Management\Office\GR Setup\UT\GP.
2. Run the Mass Audit Utility.
3. Run the GPA Calculation Utility.

Running the Student Rank Report

The Student Rank Report shows a report of the cumulative ranking of students, and updates rank information to the Current sub-tab under the GPA tab in Student Profile. You run this process after you enter Grade Marks and before you print reports that include student rank. After you run the report, you can update the student's current rank information.

Tip Process the report first to verify that the information included is accurate. Once verified, choose Update Rank Info to Student Master on the report template under Additional Processing Information to update the Student GPA tab and process the report again. This allows you to verify that the ranking information is correct before updating the GPA tab.

To run the Student Rank Report:

- Go to Student Management\Office\GR\RE\SL\SR.

Note You cannot process Student Rank for previous school years. For a report on the rank of your students, run the Student Rank Report before you run the Student Year End Wizard.

Running Transcript Labels

Transcript Labels can include attendance, activities, grading, and credit information. You can print them at the end the semester or at the end of the school year and affix them to a Permanent Record Card.

Note	Run Mass Audit, GPA Calculation, and Student Rank with Update Rank procedures before you print the Transcript Labels. This ensures GPA and Rank information is current for each student.
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To run Transcript Labels:

- Go to Student Management\Office\GR\TR\RE\TL.

Preparing Textbook Information

Before running the Student Year End Processes, you can find all textbooks that have not been returned. To do this, run the Textbook Assignment Audit Utility.

Running the Textbook Assignment Audit Utility

The Textbook Assignment Audit Utility finds all textbooks assigned in a date range that do not have a return date. If the process finds the same book twice, the Textbook Assignment Record that does not match the school year is removed. If the process does not find the same book twice, the school year is changed on the Textbook Assignment Record to the school year entered. To learn more about the Textbook Assignment Audit Utility, see "Textbook Assignment Audit" in the *WSIPC Guide to Textbook*.

To run the Textbook Assignment Audit Utility:

- Go to Student Management\Administration\TE Setup\UT\TA.

Preparing Obligation Information

Student Obligations are tracked in the Obligations module. Typically, Obligations must be met or waived before a student advances or graduates.

Running the Clone Student Obligation Information for Year to Year Utility

If your district has the same obligations each year, you can clone them from year to year. The Clone Student Obligation Information from Year to Year Utility copies current year student obligations to an upcoming year. This is not a required Year End process, but you may find it useful. To learn more about Student Obligations, see the *WSIPC Guide to Obligations*.

To run the Clone Student Obligation Information from Year to Year Utility:

- Go to Student Management\Administration\OB Setup\UT\YE\CS.

Preparing Scheduling Information

To ensure that Scheduling information is accurate and has been created before running the Student Year End Wizard, verify that the Next Year Table Creation has been completed, and that an actual Schedule Generation has been run. This section explains both tasks.

Verifying Next Year Table Creation Status

Verify that the necessary tables have been created for scheduled Entities. You typically complete this as part of Future Scheduling because it involves cloning Entity Year and Term Definitions, Scheduling Files, Calendar Files and Control Set information from the current school year to the next school year. It is important to know which tables have been created for the next school year because you do not want them to be overwritten when you run the Year End Wizard.

Note If the necessary tables have not been created, you can create them when you run the Student Year End Wizard. To learn more about this process, see "[Running the Next Year Table Creation Wizard](#)" (page 53).

To verify the Next Year Table creation status:

1. Go to Student Management\Office\FS Setup\UT\SC.
2. Verify that the word "Completed" appears in the Status column for the following processes:
 - Clone Calendar Information
 - Clone Entity Year and Term Definition
 - Clone Scheduling Master Files

Note Verify that Next Year Table creation has been completed in every Entity.

For detailed processes about Next Year Setup and Codes, see "Step 2: Maintain Scheduling Setup and Codes" in the *WSIPC Guide to Future Scheduling: Part One - Preparing to Schedule*.

Verifying That an Actual Schedule Generation Has Been Run

During the Student Year End Process, “next year” becomes the “current year.” If you do not run an Actual Schedule Generation before running the Student Year End Wizard, you can run it after Student Year End Processing is complete using the Future Scheduling tools. If the scheduling run is done after Student Year End Processing, contact your Student Support staff to ensure that your Entity is configured to allow using Future Scheduling tools in the current year. See “Appendix E” in the *WSIPC Guide to Future Scheduling: Part One - Preparing to Schedule* to learn more about configuring an Entity to allow Current Year scheduling.

To verify that an Actual Schedule Generation has been run:

1. Go to Student Management\Office\FS\SS\AS\RA.
2. Confirm that “Actual” appears in the Run Type column for each grade level in the Entity.

For detailed instructions on the Next Year Schedule Generation process, see the *WSIPC Guide to Future Scheduling: Part Four - Scheduling Students*.

Preparing Activity Information

If you use the Activities module, you can update student awards and participation in accordance with your district’s business practices. If you are using some or all of the same Activity Codes in the following year, and most of the same students are continuing in the activity, you can clone all or selected codes from one year to the next.

Cloning Student Activities

The Clone Student Activities Utility also clones the students in the selected activities to the next year. Records are added for the students for the next year with the same Start Date and End Date but the year is incremented. To learn how to perform activity tasks, see the *WSIPC Guide to Activities*.

To clone Student Activities:

- Go to Student Management\Office\AC Setup\UT\CS.

Disabling System Access

When any Student Year End Process is running, only the person processing Student Year End should be signed in. Otherwise, records can become corrupt.

This section discusses areas to consider when disabling System Access.

Note You cannot view the users currently connected to the database in the Web interface. However, you can view the District Login History to see when users last signed in.

Locking Student-Related Systems

When possible, lock the student-related systems the night before you start any Student Year End Process. This allows users to complete their work and prevents them from signing in again the next day. Locking the system does not sign out users. However, you may want to verify that the Automatic Log Out Options (Product Setup\Skyward Contact Access\DS\CF\WC) are set up to ensure that users are signed out overnight. The student-related systems are Student Management, Family Access, Student Access, Educator Access Plus, and New Student Online Enrollment.

Coordinate with other staff members who perform Year End activities in the separate modules before locking the student-related systems. For example, many districts have one person who performs Food Service Year End, another who performs Gradebook Year End, and so on. Make sure each of these people has completed their work prior to starting the Student Year End Processing.

To lock student-related systems:

1. Go to Product Setup\System Administration\SA\UT\LO.

Note When Student related systems are locked, users attempting to sign in to the software see the following message:

“[Application name that is locked] is locked by [name of user who locked the Application].”

2. In the System Locks area, click the following buttons:
 - Lock Educator Access Plus
 - Lock Student Management

- Lock Family Access
- Lock Student Access
- Lock New Student Online Enrollment (if applicable)
- Lock API (if applicable)

When you lock areas, an Unlock button is enabled for each locked area in the System Locks area. This confirms that the system is locked and by whom.

Locking All Systems

If you want to prevent all users, including Financial Management, Human Resources, and Product Setup users from accessing the software while you are processing Student Year End, you can do so by locking all systems. However, this may require much more coordination.

To lock all systems:

1. Go to Product Setup\System Administration\SA\UT\LO.
2. In the System Locks area, click Lock All Systems. A message at the top of the System Locks area confirms that all systems are locked.

Note When all systems are locked, users attempting to sign in to the software see the following message:

“All applications are currently unavailable due to district maintenance. They were locked by [name of user who locked the system]. Users will not be allowed to sign in until this process has ended.”

Bypass System Locks

The Bypass System Locks option provides the ability to allow specific users to access the system while it is locked.

To bypass system locks:

1. Go to Product Setup\System Administration\SA\UT\LO.
2. In the Bypass System Locks box, enter individual usernames of those users who will be allowed to access the system while it is locked.

Note To allow more than one person to bypass the system lock, enter each username separated by a comma.

Unlocking the Systems

After Student Year End processing is complete, you must unlock any systems that are locked. For instructions on how to unlock a system, see "[Finishing Student Year End Processing](#)" (page 84).

Viewing the District Login History

If you lock the system the night before you perform Student Year End Processing, most users are signed out, or the nightly process within the database terminates their sessions. The process below shows you how to view the District Login History.



Caution You cannot tell whether Skyward's Student Management System users are currently signed into the database. When you view the District Login History, you are looking for users who have signed in since you locked the system. There should be no Login Records for the current date other than your own.

To view the District Login History:

1. Go to Product Setup\Skyward Contact Access\CA\LH.
2. Review the names in the District Login History list to see if anyone has signed in since the system has been locked.

Contacting Connected Users

If users have signed in, contact them to determine whether they are still signed in. If they are still signed in, instruct them to sign out. Before you run any Student Year End Process, view the District Login History list again to ensure that no other users have signed in to the database.

Note The list of users includes any Finance and HR users who are signed in to the system. If you locked the student-related systems only, you only need to contact the student users listed.

Confirming the Existence of Backups

Confirm that a backup of your district's data exists from just before Student Year End Processes are run. This ensures that your district can restore the data if something goes wrong during Student Year End Processing.

Although WSIPC makes a backup of every district's data each night, WSIPC keeps this backup for only two to four days. However, each Information Service Center (ISC) has its own backup policy. It may be wise for a district to coordinate with its ISC to ensure that the ISC runs a backup before the district performs Student Year End Processing. Alternatively, the district may wish to schedule its Student Year End Processing around the ISC's backup schedule.

Running the Student Year End Wizard

The Student Year End Wizard walks you through each step of the Student Year End Process, explains the order in which you should process Entities, and shows you how to select an Entity to process.

The Student Year End Wizard consists of six overall processes:

1. Pre-Year End Validation
2. Next Year Table Creation
3. Student Program Withdrawals
4. Student Year End Processes
5. Year Start Utilities
6. Post-Year End Validation Report

This section explains the required steps for these six processes.

Processing Entities in the Correct Order

You must run the Student Year End Wizard on all active Entities in the following order:

1. Elementary Schools
2. Middle Schools
3. Junior High Schools
4. High Schools
5. District Entity 000

Processing Entities in the correct order ensures that the Default Entity flag is set correctly on the Withdrawal Record that the Student Year End Wizard creates. This flag determines whether the Entity was the Primary School for each student for CEDARS Reporting.

You must run the Student Year End Wizard for the following Entities as well, but you can process them in the order your district chooses:

- Summer School Entities
- Entity 999

Note For inactive Entities, run Student Year End Procedures for the last school year that the Entity is Active. It is not necessary to run Student Year End Procedures on an inactive Entity for subsequent school years.

You *must* process Entity 000 last (other than Summer School Entities and Entity 999, which you can process after Entity 000 if needed).

Note The process to change the School Year for CEDARS extracts is a separate process that is not tied to Student Year End Processing. You can process Entity 000, which changes the school year for Student Records, before or after changing the School Year for CEDARS. To learn how to change the CEDARS year, see the *WSIPC CEDARS Data Cross Reference* document in SkyDoc (WSIPC / CEDARS Xref / CEDARS Data Cross Reference to WESPaC Data Source (2023-2024)).

Accessing the Student Year End Wizard Selection Screen

To begin Student Year End Processing, you must access the Student Year End Wizard Selection screen (Figure 1). This screen contains each of the wizards for the six processes that you use in Student Year End Processing.

To access the Student Year End Wizard Selection screen:

1. Select the Entity you want to process.
2. Go to Student Management\Office\YE\SY.

Current School Year: 2019-20	
Please select a wizard below	Last Run / Status
<input checked="" type="radio"/> Pre-Year End Validation This report will validate that students have a valid calendar and school assigned to them. It will also verify that students set to be retained or advanced are set up correctly and that outgoing students have a NY Status of inactive. This report can be run any time you wish to validate these values.	07/17/2019 by cstaker51
<input type="radio"/> Next Year Table Creation This wizard will create the necessary data for next year scheduling and the next year's school calendar. There are options for creating term definitions, course data, and school calendar information. Entity Year completed by <i>Lashaunda Zablockiscr</i> on 04/30/2018 via Future Scheduling area Course Master completed by <i>Lashaunda Zablockiscr</i> on 04/30/2018 via Future Scheduling area Calendar Master completed by <i>Lashaunda Zablockiscr</i> on 04/30/2018 via Future Scheduling area	Not Available
<input type="radio"/> Student Program Withdrawals This wizard will create year end withdrawal records for student programs.	07/17/2018 by [redacted]
<input type="radio"/> Student Year End Processes This wizard will close out the school year and prepare data for the next school year. There are options for saving grading and attendance information, withdrawing students, and updating student status.	07/17/2019 by cstaker51
<input type="radio"/> Year Start Utilities This wizard will start the new school year. There are options for cloning codes, creating student entry records, updating student status, and running a GPA calc.	07/17/2019 by cstaker51
<input type="radio"/> Post-Year End Validation Report. This report checks graduated flags, graduation dates, entry/withdrawal records, grad years, statuses, class statuses, and default entities.	07/17/2019 by cstaker51
Entities to Process Current School Year: 2019-20	
To process year end for multiple entities at once, select the entities below to process with the <i>current entity</i> . Only entities with the same grade ranges and school year and that you have security for are displayed below. If the grade ranges for any of the entities are incorrect, please correct them before proceeding with year end processing.	
Grades P3 to 5 <input checked="" type="checkbox"/> 103	
<i>To correct the grade ranges, please click here. Next, find the entity that you would like to change and expand the record to view its details. Next, look at: Current School Year Scheduling and click the Edit Maximum Values link. Repeat these steps for each incorrect entity.</i>	

Figure 1 - Student Year End Wizard Selection screen

Selecting Entities to Process

The Student Year End Wizard allows you to process many Entities at the same time. The Entity you selected prior to going to the Student Year End Wizard is already selected at the bottom of the Wizard Selection screen. You can only select Entities that you have Student Year End security permissions for, that have the same grade levels, and that are in the same current school year.

Note When multiple Entities are selected to process, they do not process at the same time. The Year End Wizard starts at the lowest Entity number of the Entities selected and then continues to the next one. The advantage of doing this is that you answer the wizard questions once, ensuring that all Entities are processed with the same values.

To select Entities to process:

- In the Entities to Process area at the bottom of the Student Year End Wizard Selection screen, select the check box next to any Entity that you want to process.

Note Be sure that the Current School Year Scheduling Maximum Values (Product Setup\Student Management\ES\CF\EY) are correct. Many steps of the Student Year End Wizard use these grade levels to help you process Student Year End. If these are not correct, errors may occur during processing.

There is a hyperlink at the bottom of the Wizard Selection screen to take you directly to the Current Year Scheduling Maximum Values.

Running the Pre-Year End Validation Wizard

Pre-Year End Validation is the first step in the Student Year End Wizard. It confirms that students are assigned to a valid calendar and school. The Pre-Year End Validation wizard also analyzes Student Records for invalid retained year, advanced year and next year status.

You can run this step of the Student Year End Wizard any time you want to validate this information assigned to students.

To run the Pre-Year End Validation Wizard:

1. Go to Student Management\Office\YE\SY.
2. Select Pre-Year End Validation and click Next.
3. After processing, view the Pre-Year End Validation Report.

The report lists the student with invalid calendars, schools, Retained, Advanced, and Next Year's Status. It also provides a student count for each Graduation Year/Grade. You must correct the students with invalid information before you can continue.

Note If invalid information appears, instructions on how to fix errors is included at the end of the Pre-Year End Validation Report.

Running the Next Year Table Creation Wizard

The Next Year Table Creation Wizard is the second step of the Student Year End Wizard. For reference, it shows the answer you used in the previous year for each step.

The Next Year Table Creation step of the Student Year End Wizard creates the Entity Year, Scheduling and Calendar Records needed for the next school year. If these records have already been created for the next school year, a message appears informing you who, when, and where the table was created.

Example "Entity year completed by [user name] on [date] via Future Scheduling area" appears if Entity Year was generated through Future Scheduling.

Prior to running Student Year End, you can also run the Status of Clone Utility to verify the status of these records. See "[Verifying Next Year Table Creation Status](#)" (page 43) to learn how to run the Status of Clone Utility.



Caution When running this Wizard, answer Yes to each question only if the area (Entity Year, Scheduling or Calendar Records) has not already been created, or if you want to modify the previously cloned information. Changes made to the dates through this Wizard may overwrite what was created through Future Scheduling. To learn more about this, see "Maintain Scheduling Setup and Codes" in the *WSIPC Guide to Future Scheduling: Part One – Preparing to Schedule*.

To run the Next Year Table Creation Wizard:

1. Go to Student Management\Office\YE\SY.
2. Select Next Year Table Creation.
3. Click Next.
4. Click Next again on the Welcome to Next Year Table Creation Wizard screen, and continue to "[Completing Entity Year Steps](#)" below.

Completing Entity Year Steps

This step of the Next Year Table Creation Wizard creates the Entity Year and Term Definitions. These dates are necessary for scheduling, attendance and State Reporting because they define the school year.

To complete the Entity Year steps:

1. Answer the Step 1 question, "Would you like to clone entity year and term definitions?" by selecting Yes or No.



Caution

If the Entity Year was created through Future Scheduling, the Student Year End Wizard warns you that the Entity Year already exists. Do not clone Entity Year and Term Definitions again unless you want to overwrite them.

2. Click Next.
3. Do one of the following:
 - If you selected No on the Step 1 screen, you cannot modify any values on the Step 2 screen. Click Next, and continue to "[Completing Scheduling Steps](#)" below.
 - If you selected Yes on the Step 1 screen, modify the dates and click Next. Continue to "[Completing Scheduling Steps](#)" below.

Note

If you do not know the dates for next year select Yes. The Student Year End Wizard uses this year's dates and advances them by one year. You can change the dates later.

Completing Scheduling Steps

This step of the Next Year Table Creation Wizard allows you to clone the Course Master and any or all of its components if it was not done as part of Future Scheduling. Cloning the Course Master, Sections and Meets are necessary if you schedule students into classes.

To complete the Scheduling steps:

1. Answer the Step 1 question, "Would you like to clone scheduling master information?" by selecting Yes or No.



Caution If Scheduling Master Records were cloned through Future Scheduling, the Student Year End Wizard warns you that they already exist. Do not clone the Scheduling Master Records again unless you want to overwrite them.

2. Click Next.
3. Do one of the following:
 - If you selected No on the Step 1 screen, you cannot modify any values on the Step 2 screen. Click Next.
 - If you selected Yes on the Step 1 screen, select the scheduling information you would like to clone and click Next.
4. Answer the Scheduling Step 3 Wizard question, "Would you like to clone cross-entity enrollment links?" by selecting Yes or No.

Note Cross Entity Enrollment is not typically used in Washington State because it does not support Washington State Reporting requirements. To determine if it is enabled, you can go to: Product Setup\Skyward Contact Access\DS\CF\ST.

5. Click Next.
6. Continue to "[Completing Calendar Steps](#)" below.

Completing Calendar Steps

Completing the calendar steps of the Next Year Table Creation Wizard allows you to clone calendar information if it was not done as part of Future Scheduling. This includes the Calendar Master, Terms, Calendar Days, and Bell Schedules. The calendar is required to identify the start and stop dates of the school year. It is used in scheduling, and in entering Attendance Records for students.

To complete the calendar steps:

1. Answer the Step 1 question, "Would you like to clone calendar information?" by selecting Yes or No.



Caution If Calendar Records were created through Future Scheduling, the Student Year End Wizard warns you that they already exist. Do not clone Calendar Records again unless you want to overwrite them.

Note	If you do not know the dates for next year select Yes. The Student Year End Wizard uses this year's dates and advances them by one year. You can change the dates later.
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2. Click Next.
3. Do one of the following:
 - If you selected No on the Step 1 screen, you cannot modify any values on the Step 2 screen. Click Next.
 - If you selected Yes on the Step 1 screen, modify the dates for the Calendar Master and click Next.
4. To answer the Calendar Step 3 Wizard question, "Would you like to automatically generate calendar days?," do one of the following:
 - If you selected Yes in Step 1 and your next year calendar *has* been finalized, select Yes.
 - If you selected Yes in Step 1 and your next year calendar has *not* been finalized, select No.
 - If you selected No in Step 1 you cannot respond to this question.
5. Select Next, and continue to "[Completing the Recap and Run Step](#)" below.

Completing the Recap and Run Step

The Recap and Run step allows you to review your responses to the questions in this part of the Student Year End Wizard.

To complete the Recap and Run step:

1. Review the responses on the Next Year Table Creation Wizard Recap screen. This screen shows you your answers to the questions.
2. (Optional) To make modifications, click Previous in the upper-right corner, or click the appropriate step under the area you want to update. For example, to change your response to the Scheduling questions, click Step 1 under Scheduling.
3. When you finish making updates, click Recap and Run on the left side of the screen.

4. Click Start Next Year Table Creation. A message appears stating that processing several Entities at once or processing large Entities may take hours.

Note	During the time that the Next Year Table Creation Wizard is running, you can't run other Year End Wizards for the selected Entities.
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5. Do one of the following:
 - To run the Next Year Table Creation Wizard now, click Start Processing.

Note	The Next Year Table Creation process is sent to your Print Queue and processed on the App Server. When processing is complete, a message appears that allows you to view a report listing your selections and any results of the process.
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- To postpone this process, click No.

Running the Student Program Withdrawals Wizard

The Student Program Withdrawals Wizard allows you to withdraw multiple students from Student Programs found on the Special Prgms tab in Student Management (Student Management\Students\ST\PR). Some Student Programs require all students to be withdrawn each year. Some Student Programs do not require students to be withdrawn from the program until they leave or change District Entities.

You can run the Student Program Withdrawals Wizard multiple times. For example, you can withdraw *all students* from one program, and then run it a second time to withdraw only students in the *outgoing class* for a different program selection.



Caution

OSPI requires students reported as English Learners (maintained on the Special Prgms/Ltd Eng Prof tab) to have a program start date during the current school year. For students who are continuously enrolled across multiple school years, the start date must be the first day of the next school year.

While you can withdraw students with the Student Program Withdrawals step of the Year End Wizard, it only creates the Withdrawal Record. It does not create the Reenrollment Record in the next school year for continuously enrolled students. Instead, you must then create Reenrollment Records manually.

To create the LEP Withdrawal and Reenrollment Records for continuously enrolled students use the Mass Change LEP for Continuing Students Utility (Student Management\Students\ST Setup\UT\NU\MC). To learn more about creating LEP Withdrawal and Reenrollment Records, see "[Running the Mass Change LEP for Continuing Students Utility](#)" (page 112).

To run the Student Program Withdrawals Wizard:

1. Go to Student Management\Office\YE\SY.
2. Select Student Program Withdrawals.
3. Click Next.
4. Click Next again on the Welcome to the Student Program Withdrawals Wizard screen, and continue to "[Completing the Student Programs Step 1](#)" below.

Best Practice

Consider ending any Special Program Record where an Entity is specified on the record *and* the student is moving to a different Entity. You must then add a new record for the student for the new Entity. This can be done manually or using the Mass Add Special Programs Utility and using a Student Selection of By Individual or By Processing List.

Completing the Student Programs Step 1

This step of the Student Program Withdrawals Wizard allows you to select which Student Programs you want to mass create Withdrawal Records for. You can also select the Exit Reason for Student Programs that require a reason.

Note If you want to mass withdraw all students from one program, but only the outgoing class from another program, run the Student Program Withdrawals Wizard separately for each program.



Caution Specific Learning Assistance Program Records (Program Codes 6, 7, 37 and 38) and Washington Reading Corps Literacy Support Records (Program Code 44) must have Student Growth Data reported in CEDARS and the data must be specific to the school year the student is enrolled in the program. Therefore, these records must be ended and started (if the student is continuing in the program) each school year. While you can mass withdraw students from the programs through this step in the Year End Wizard, you must first make sure you know who the continuing students are (by Program Code). This ensures you know who you need to Mass Add a Special Programs Record for before ending all records.

For processing instructions and recommendations for these program records, see ["Running the Mass End and Mass Add Special Programs Utility to Maintain LAP and WRC Records"](#) (page 114).

Note Military Family Records *do not* need to be *mass* ended each School Year. Instead, end records for only students who are leaving your district and for those students who's Military Family Status may have changed.

To complete the Student Programs Withdrawals Step 1:

1. On the Step 1 screen, do the following in response to the statement, "Select the Student Programs to mass create withdrawal records for."
 - a. Select the Student Program(s) you want to create a Withdrawal Record for.

Note For LAP, Title Prg and Oth WA Prg, choose the specific Program Code you want to create a Withdrawal Record for. You can select multiple codes.

- b. In the Exit Reason box, enter an Exit Reason Code for Student Programs that require one.

Note Exit Reason Codes are required for State Reporting purposes when you withdraw a student from some Student Programs.

2. Click Next, and continue to "[Completing the Grade Range Step 2](#)" below.

Completing the Grade Range Step 2

The next step of the Student Program Withdrawals Wizard allows you to select the grades to create a Withdrawal Record for. If there is already a Withdrawal Record for the student, a new one is not created.

To complete the Grade Range Step 2:

1. On the Step 2 screen, respond to the statement "Enter the grade ranges to create withdrawals for."

Note	The Grade Range entered is typically for the outgoing class if a new Student Program Record is required when a student moves to a new Entity or School. However, the Grade Range does give you the option to withdraw all students in the Entity for a specific program.
-------------	--

2. Click Next, and continue to "[Completing the Calendars Step 3](#)" below.

Completing the Calendars Step 3

This step of the Student Program Withdrawals Wizard allows you to select the Calendars to include. Only students on selected calendars are processed.

To complete the Calendar Step 3:

1. On the Step 3 screen, respond to the statement "Select the calendars that you would like to create withdrawals for."
2. Click Next, and continue to "[Completing the Schools Step 4](#)" below.

Completing the Schools Step 4

This step of the Student Program Withdrawals Wizard is where you select the Schools to include. Only students in the selected schools are processed.

To complete the Schools Step 4:

1. On the Step 4 screen, respond to the statement, "Select the schools that you would like to create withdrawals for."

2. Click Next, and continue to "[Completing the Withdrawal Date Step 5](#)" below.

Completing the Withdrawal Date Step 5

This step of the Student Program Withdrawals Wizard is where you enter the withdrawal date to use on the Student Program Withdrawal Record.

To complete the Withdrawal Date Step 5:

1. On the Step 5 screen, respond to the statement "Enter the withdrawal date to use."

Best Practice	Enter a withdrawal date that is within the current school year. This is typically the last day of school.
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2. Click Next, and continue to "[Completing the Recap and Run Step](#)" below.

Completing the Recap and Run Step

The Recap and Run step allows you to review your responses to the questions in the Student Program Withdrawals Wizard.

To complete the Recap and Run step:

1. Review the responses on the Student Program Withdrawals Wizard Recap screen. This screen shows you whether or not Student Program Withdrawal Records will run.
2. (Optional) To make modifications, click Previous in the upper-right corner, or click the appropriate step under the area you want to update. When you're finished making updates, click Recap and Run on the left side of the screen.
3. Click Start Student Program Withdrawals. A message appears stating that processing several Entities at once or processing large Entities may take hours.

Note	During the time the Student Program Withdrawals Wizard is running, you can't run other Year End Wizards for the selected Entities.
-------------	--

4. Do one of the following:

- To run the Student Program Withdrawals Wizard now, click Start Processing.

Note The Student Program Withdrawals Wizard process is sent to your Print Queue and processed on the App Server. When processing is complete, a message appears that allows you to view a report listing your selections and any results of the process.

The report does not list the students for whom a Withdrawal Record was created.

- To postpone this process, click No.

Note If you are running the Student Program Withdrawals Wizard a second time for a different group of students, the following message appears in the upper right corner of the Wizard:

“Warning!! Last run [mm/dd/yyyy] for the [yyyy-yy] school year.”

The Wizard also defaults to the Recap and Run step.

- Click Step 1 to select the next program you want to withdraw students from.
-

Running the Student Year End Processes Wizard

The Student Year End Processes Wizard closes the current school year and prepares data for the next school year.

Before running the Student Year End Processes Wizard, ensure that any student to be retained or advanced has the appropriate field set to Yes on the Profile sub-tab under the General tab in Student Profile. Also, the student’s NY Grad Year should be one year higher (for retained students) or one year lower (for advanced students) than their current graduation year. To learn more about this process, see [“Marking Students as Advanced or Retained”](#) (page 32).

If the Entity uses the Future Scheduling module to schedule, determine whether you should process an Actual Scheduling Run. For more detailed information on this process, see [“Verifying That an Actual Schedule Generation Has Been Run”](#) (page 44).

The Student Year End Processes Wizard involves the following processes:

- Processes all Grading, Attendance, and Class Record information, creating Historical Records.
- Allows you to withdraw the outgoing class and manage the Entry Withdrawal Records for advanced and retained students
- Updates students' status for the current (next) year
- Increments the school year for the Entity
- Updates the Entity Counts for the next school year and creates counts for the following year

To run the Student Year End Processes Wizard:

1. Go to Student Management\Office\YE\SY.
2. Select Student Year End Processes and click Next.
3. Click Next again on the Welcome to the Student Year End Processes Wizard screen, and continue to "[Completing the Grading Steps](#)" below.

Note	Safeguard to Year End being run multiple times in error If you try to run the Year End process in an Entity for which the current year's start date is in the future, an error message appears stating that the Year End Process cannot be run.
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Completing the Grading Steps

This process updates current year GPA information on the GPA tab in Student Demographics. Although this process may take a significant amount of time to run, most high schools and some middle schools save GPA and credit totals, and *must* run this process. When you run this process, there is an option to save points and credits for term GPA information. Saving the term GPA information is optional unless you need to access and compare term GPA data at a later date.

If you don't run the process to save GPA and credit totals, you cannot run it later, and all current year GPA information is lost. Many elementary schools do not need to save GPA and credit totals, so they do not need to run this process.

To complete the Grading steps:

1. Answer the Step 1 question, "Would you like to save student/GPA credit totals?" by selecting Yes or No.
2. Click Next.
3. Do one of the following:
 - If you selected No, continue clicking Next until you reach the Step 1 screen for the Attendance area. Continue to "[Completing the Attendance Step](#)" (page 64).
 - If you selected Yes, enter the grade ranges you want to save GPA/credit totals for on the Step 2 screen and click Next.
4. On the Step 3 screen, select the calendars that you want to save GPA/credit totals for and click Next.
5. On the Step 4 screen, select the schools that you want to save GPA/credit totals for and click Next.
6. On the Step 5 screen, next to the question "Would you like to save points and credits for term GPA information?" select Yes or No.
7. Click Next, and continue to "[Completing the Attendance Step](#)" below.

Completing the Attendance Step

This process takes attendance for the current year and makes it historical. Doing this may cause this part of the Student Year End Wizard to take longer, but if attendance is not saved to history before or during Student Year End, you cannot access it after Student Year End is complete.

Tip Because of the length of time it adds to Student Year End processing, you can run the Update Attendance History YTD Totals Utility before you begin running Student Year End, as outlined in "[Verifying Next Year Table Creation Status](#)" (page 43).

To complete the Attendance step:

1. Next to the question, "Would you like to process student attendance records?" select Yes or No.

Note If you are not sure whether the Update Attendance History YTD Totals Utility was run for this Entity, select Yes to process Attendance Records.

2. Click Next, and continue to "[Completing the Class History Step](#)" below.

Completing the Class History Step

This process converts classes that are not graded *and* do not keep attendance into Historical Records so you can view them in the student's class history.

Note All classes that keep grades and/or attendance are automatically included in the Class History.

Note CEDARS requires that all absences from any seat time instruction must be reported in the Student Absences File.

Note A non-graded class is any Course in the Course Master (Student Management\Office\CS\BC\CM) for which the Grade Course check box is not selected, such as study halls, lunches, and classes only used to track attendance.

To complete the Class History Step:

1. Next to the question "Would you like to change classes to historical that were not graded and did not keep attendance?" do one of the following:
 - Select No if you do not want to keep classes that were not graded and did not keep attendance.
 - Select Yes if you have any classes that are not graded and do not keep attendance that you want to view in a student's Class History.

Best Practice Respond Yes to the question, "Would you like to change classes to historical that were not graded and did not keep attendance?" There is no harm in processing this step.

2. Click Next, and continue to "[Completing the Mass Withdrawal Steps](#)" below.

Completing the Mass Withdrawal Steps

This process creates a Withdrawal Record and a new Entry Record for Retained students and Advanced students. It also creates a Withdrawal Record for the outgoing class (students leaving the current Entity due to promotion or graduation).

Note ["Completing Mass Withdrawal Step 4"](#) (page 69) is used to preserve the value in the Student GLO box for any Kindergarten class.

Completing Mass Withdrawal Step 1

Mass Withdrawal Step 1 allows you to enter the Withdrawal and new Entry Record values for retained students, including Transitional Kindergarten students who will become regular kindergarteners the following year.

Note For alternate methods for processing Transitional Kindergarten students, see the *Managing Transitional Kindergarten Students* document.

To complete Mass Withdrawal Step 1:

1. Do one of the following on the Step 1 screen:
 - If no students have been marked as Retained Yes, you cannot add information to this screen. Click Next.
 - If one or more students have been marked as Retained Yes, go to the next step in this procedure.
2. Enter the last day of the current school year in the Withdrawal Date box.
3. Enter the code for withdrawing retained students in the Withdrawal Code box.
4. (Optional) Enter a comment in the Withdrawal Comment box.
5. Select the Re-enter Retained Students Now check box.
6. Enter a re-entry date in the Entry Date box. To avoid a span in dates, the Re-entry Date should be the day after the Withdrawal Date.

Example Student A is being retained. The Withdrawal Date is 6/15/2024, and the Entry Date is 6/16/2024.

7. Enter the code for the new Enrollment Record for retained students in the Entry Code box.
8. (Optional) Enter a comment in the Entry Comment box.
9. Click Next, and continue to "[Completing Mass Withdrawal Step 2](#)" below.

Note A new Entry Record is created only for retained students with a NY Status of Active for the current Entity.

Completing Mass Withdrawal Step 2

Mass Withdrawal Step 2 allows you to enter the Withdrawal and new Entry Record values for academically advanced students (students skipping a grade level but not changing buildings).

To complete Mass Withdrawal Step 2:

1. Do one of the following on the Step 2 screen:
 - If no students have been marked as Advanced Yes, you cannot add information to this screen. Click Next.
 - If one or more students have been marked as Advanced Yes, go to the next step in this procedure.
2. Enter the last day of the current school year in the Withdrawal Date box.
3. Enter the Withdrawal Code for advancing students in the Withdrawal Code box.
4. (Optional) Enter a comment in the Withdrawal Comment box.
5. Select the Re-enter Advanced Students Now check box.
6. Enter a re-entry date in the Entry Date box.
7. Enter the code for the new Enrollment Record for advanced students in the Entry Code box.
8. (Optional) Enter a comment in the Entry Comment box.

9. Click Next and continue to "[Completing Mass Withdrawal Step 3](#)" below.

Note	A new Entry Record is created only for advanced students with a NY Status of Active for the current Entity.
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Completing Mass Withdrawal Step 3

Mass Withdrawal Step 3 allows you to enter the Withdrawal Record values for the outgoing class.

To complete Mass Withdrawal Step 3:

1. Select the **Withdraw Outgoing Class** check box.
2. Enter the last day of the current school year in the **Withdrawal Date** box.

Note	If the outgoing class is the twelfth grade, enter either the last day these students attended class or their graduation date, whichever business practice your district follows.
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3. Enter the appropriate code for this outgoing class in the **Withdrawal Code** box.
4. (Optional) Enter a comment in the **Withdrawal Comment** box.
5. Enter the outgoing class's grade level in the **Outgoing Grade** box.

Example	The elementary outgoing class is the fifth grade, the middle school outgoing class is the eighth grade, and the high school outgoing class is the twelfth grade.
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6. Do *not* select the **Mark Students as Graduated** check box.

Note	The Student Graduation Date Mass Create/Change Utility, which you ran before you began the Student Year End Process, updated the Graduated Flag and Graduated Date. Selecting Mark Students as Graduated overwrites the flag and date previously set through the utility.
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7. Do *not* enter a date in the **Graduation Date** box. See the Note in step 6 above.

8. Do *not* enter data into any of the boxes in the Already Graduated Students Values column.

Note This area is intended for students who are marked as graduated but have not yet been withdrawn. In Washington State, any student who graduates before the end of the school year must already be flagged as graduated *and* withdrawn to meet State Reporting requirements.

9. Click Next, and continue to "[Completing Mass Withdrawal Step 4](#)" below.

Completing Mass Withdrawal Step 4

Mass Withdrawal Step 4 is used in states that require all students to be withdrawn at the conclusion of every school year. While Washington State does not have this requirement, you have the option to use this step to withdraw Kindergarten students who have a GLO value stored on their record for state reporting purposes.

Best Practice For state reporting purposes, this would only be needed to capture a GLO value of K2 (Part-day Kindergarten program) which in most cases affects just a few students. For that reason, the best practice is to manage these students outside of the Student Year End Wizard. See "[Clearing the Elementary GLO from Student Profile](#)" (page 121) to learn how to clear the GLO from Student Profile for the kindergarten students.

Note If students are withdrawn in this step, then see "[Completing the Mass Entry Steps](#)" (page 75) in the "[Running the Year Start Utilities Wizard](#)" section, to learn how to re-enroll them.

To complete Mass Withdrawal Step 4:

1. Do one of the following:
 - If you have Kindergarteners with a value of K2 in the GLO box and want to preserve the Student GLO on the E/W Record, do the following:
 - i. Select the **Withdraw the Remaining Students** check box.
 - ii. In the **Withdrawal Date** box, enter the last day of the current school year.

- iii. Enter a Withdrawal Code in the Withdraw Code box to indicate the reason for withdrawal.

Note Use a Withdraw Code that does not have a State Type value associated with it.

- iv. (Optional) Enter a comment in the Withdrawal Comment box.
 - v. Enter the Kindergarten class's grade level in both the High and Low boxes for the Remaining Grades.
 - vi. Click Next, and continue to "[Completing Mass Withdrawal Step 5](#)" below.
- If you do not have Kindergarten students with a value of K2 in the GLO box, do the following:
 - i. Do *not* select the Mass Withdraw Remaining Students option.
 - ii. Verify that the Withdraw the Remaining Students check box is cleared.
 - iii. Click Next, and continue to "[Completing Mass Withdrawal Step 5](#)" below.

Note If the Entity you are processing is closing, you may want to withdraw the remaining students through this step of the Year End Wizard. To learn how to withdraw remaining students when closing an Entity, contact your Information Service Center.

Completing Mass Withdrawal Step 5

Mass Withdrawal Step 5 allows you to close open Transportation Records for the students you are withdrawing.

Note Transportation Records are found in Student Profile on the Transportation sub-tab under the Busing tab. This does not affect the Bus Stops Records.

To complete Mass Withdrawal Step 5:

1. Do one of the following on the Step 5 screen:
 - Select Yes if you create a new Transportation Record when students move from one Entity to another.
 - Select No if you are not using Transportation Records or they do not change when student's move from one Entity to another.
2. Click Next, and continue to "[Completing the Final Process Step](#)" below.

Completing the Final Process Step

This process is the final step of the Student Year End Wizard that closes out the current school year and prepares your data for the Year Start Utilities. It includes the following updates in Student Management:

- Increments the School Year
- Updates students' Status using their Next Year Status
- Updates students' Graduation Year using their Next Year Graduation Year
- Updates staff members' Current Year Status using their Next Year Status
- Updates students' Current Year Scheduling Team with the Next Year Scheduling Team if Scheduling Teams are being used
- Updates the Entity Counts for the next school year and adds the Entity Count Records for the following year

To complete the Final Process Step:

1. When you are ready to proceed, click Yes.
2. Click Next, and continue to "[Completing the Recap and Run Step](#)" below.

Caution The Final Processing step must be completed for *all* Entities. If this step is not completed for an Entity, necessary updates are skipped causing an Entity to not function properly in next school year.

Completing the Recap and Run Step

The Recap and Run step allows you to review your responses to the questions in this part of the Student Year End Wizard.

To complete the Recap and Run step:

1. Review the responses on the Student Year End Processes Wizard Recap screen.

Note Recap and Run shows your answers to the Student Year End Processes Wizard questions. Errors and warnings appear in red text under the step where they are addressed.

If the message "Correct the errors above before proceeding" appears in red text in the box under the list of options, there are steps that you *must* correct before you can proceed.

2. To correct errors and warnings, click on the red text, which takes you to the screen where you must make your correction. When finished, click Recap and Run on the left side of the screen.

Note Warnings such as "An 'Actual Schedule Run' has NOT been run" also appear in red text. These are notices for you to consider, but action is not required.

3. Repeat Step 2 to correct any additional errors.
4. Confirm that it states, "Final Process *will* be run" under the Final Process step.
5. Click Start Student Year End Processes. A message appears stating that processing several Entities at once or processing large Entities may take hours.

Note During the time the Student Year End Processes Wizard is running, you cannot run other Year End Wizards for the selected Entities.

6. Do one of the following:

- To run the Student Year End Processes Wizard, click Start Processing.

Note The Student Year End Processes are sent to your Print Queue and processed on the App Server. When processing is complete, you have the option to view a report listing your selections and any results of the process.

The report produced from the Student Year End Process reflects your response to each of the questions in the Student Year End Wizard. The second page of the report reflects how many students were processed, by grade level in each area of the Wizard. You can save this report for future reference.

- To postpone this process, click No.

Note All students in the Entity flagged for retention will be processed using the same Withdrawal and Entry information (Dates, Codes, and Comments).

You can run Mass Change Entry Withdrawal Records Utilities (Student Management\Students\ST Setup\UT\EW) after Year End Processing to change the E/W Code, E/W Date and/or Withdrawal and Entry Comments for Transitional Kindergarten students only (You may want to create Entry and Withdrawal Codes specifically for TK students).

However, to do this you must either have a Processing List, or a have assigned a specific Calendar or School to the TK students in order to select the TK students as a group (separate from other Kindergarten grade students) when running these utilities.

Running the Year Start Utilities Wizard

The Year Start Utilities Wizard helps you perform the necessary steps to start the next school year. This includes options for cloning codes, creating Student Entry Records if the previous Wizard did not create them, updating student status, and running GPA calculations.

To run the Year Start Utilities Wizard:

1. Go to Student Management\Office\YE\SY.
2. Select Year Start Utilities and click Next.
3. Click Next again on the Welcome to the Year Start Utilities Wizard screen, and continue to "[Completing the Clone Codes Steps](#)" below.

Completing the Clone Codes Steps

This process allows you to clone codes for a specific school year, which include the following:

- Absence Reasons
- Absence Types
- Activity Codes
- Address Path Codes
- Address Paths
- Address Range Defaults
- Attendance Period Times
- Attendance Thresholds
- Department Codes
- Grading Codes
- Homeroom Codes
- Schedule Groups
- Subject Codes
- Tardy Kiosk Setup

Note You may not see all of the codes listed above for the Entities you are processing.

To complete the Clone Codes steps:

1. Next to the Step 1 question, "Would you like to run the code cloning process?" select Yes or No.
2. Click Next.
3. Do one of the following:
 - If you selected No, click Next again and continue to "[Completing the Mass Entry Steps](#)" below.
 - If you selected Yes, select the codes you would like to clone and click Next. Continue to "[Completing the Mass Entry Steps](#)" below.

Completing the Mass Entry Steps

This step is run whenever the Mass Withdrawal process is run for Remaining Students during the Student Year End Processing Wizard. Run the Mass Entry process *only* if you withdrew any of your students during the Student Year End Processing that are continuing in the same building for the following year.

- Do one of the following:
 - To complete the Mass Entry steps if the Entity *did not* Mass Withdraw any of the students that are continuing in the same building for the following year:
 - a. Next to the question, "Would you like to run the mass entry process?" select No.
 - b. Click Next until you reach Step 1 of Current Year Member, and continue to "[Completing the Current Year Member Steps](#)" below.
 - If any of your Entities use a value of K2 in the Student GLO box for Kindergarten students, *and* you chose to Mass Withdraw them as part of the Year End process, use this step to create a new Entry Record for those Kindergarteners who have *now* been advanced to First Grade:
 - a. Next to the question, "Would you like to run the mass entry process?" select Yes.
 - b. Click Next.

- c. Enter the Grade Range to create an Entry Record for.

Note	The Kindergarten class that was mass withdrawn in the Year End Process Wizard was also advanced to First Grade. Enter the Grade Level Code for your First Grade, such as "01," in the ranges. You <i>must</i> enter 2 digits to represent the Grade Range Low and High values.
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- d. Click Next.
- e. Enter the Entry information for the student's new Entry Record.

Best Practice	For correct CEDARS Reporting, use the day after the student's Withdrawal Date for their Entry Date.
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- f. Click Next, and continue to "[Completing the Current Year Member Steps](#)" below.

Completing the Current Year Member Steps

This process updates the Current Year Membership flag to Yes for students in their current Entity if Current Year Status is Active and the student falls within the graduation year ranges for the Entity.

To complete the Current Year Member steps:

1. Next to the question, "Would you like to mass change student member status to Yes?" select Yes or No.

Best Practice	Answer Yes to this question. This ensures that all students are current year members for the next school year.
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2. Click Next.
3. Do one of the following:
 - If you selected No in step 1, click Next again and continue to "[Completing the Default Entity Steps](#)" below.
 - If you selected Yes, go to step 4 of this procedure.

4. In the Grade Range boxes, verify the grade ranges for the Entity or Entities you are processing and update if needed. Students must fall within this grade range and have a Current Year Status of Active for the Current Year Member flag to be changed to Yes.
5. Click Next, and continue to "[Completing the Default Entity Steps](#)" below.

Completing the Default Entity Steps

This process updates a student's Default Entity flag to Yes for students in their current active Entity as long as the student is not marked as Retained. If the student was marked as Retained, a report lists the retained students whose Default Entity could not be updated.

To complete the Default Entity steps:

1. Next the question, "Would you like to update student default Entity?" select Yes or No.
2. Click Next.
3. Do one of the following:
 - If you selected No, click Next again and continue to "[Completing the Calculate GPA Step](#)" below.
 - If you selected Yes, go to step 4 of this procedure.
4. In the Grade Range boxes, enter the grade ranges to update the Default Entity for. Typically, this is limited to the incoming class.
5. Click Next, and continue to "[Completing the Calculate GPA Step](#)" below.

Completing the Calculate GPA Step

This process runs a mass audit to update the Historical GPA for Entities that keep GPA Records. This step ensures that the process is run with the most recent information now that Student Year End has completed. The Calculate GPA step lists the Entities that will be processed. It creates a separate process in your print queue for each Entity listed.

To complete the Calculate GPA step:

1. Click Next.
2. Continue to "[Completing the Recap and Run Step](#)" below.

Completing the Recap and Run Step

The Recap and Run step allows you to review your responses to the questions in this part of the Student Year Start Utilities Wizard.

To complete the Recap and Run step:

1. Review the responses on the Year Start Utilities Wizard Recap screen.

Note Recap and Run shows your answers to the Student Year Start Utilities Wizard questions. Errors and warnings appear in red text under the step where they are addressed.

If the "Correct the errors above before proceeding" message appears in red text in the box under the list of options, there are steps that you *must* correct before you can proceed.

2. To correct errors and warnings, click on the red text, which takes you to the screen where you must make your correction. When you finish, click Recap and Run on the left side of the screen.
3. Repeat Step 2 to correct any additional errors.
4. Click Start Year Start Utilities. A message appears stating that processing several Entities at once or processing large Entities may take hours.

Note During the time the Student Year End Processes Wizard is running, you cannot run other Year End Wizards for the selected Entities.

5. Do one of the following:
 - Click Start Processing to proceed.

Note The Student Year Start Utilities are sent to your Print Queue and processed on the App Server. When processing is complete, you have the option to view a report listing your selections and any results of the process.

The Student Year Start Utilities Report shows when the Year Start Utilities Wizard completed processing and reflects your response to each of the Student Year Start Utilities questions. The second page of the report shows how many students were processed by grade level in each area of the Year Start Utilities Wizard. Print or save this report for future reference.

- Click No to postpone this process.

Note GPA Audit processes for each Entity are scheduled to run after the Year Start Utilities have completed. It is not necessary to wait for the Audits to complete before running the Post Year End Validation Report.

Running the Post Year End Validation Report

This report runs through the Student Records for the Entity or Entities selected to check for inconsistencies with the data. Students with one or more of the following issues are reported with their Entity, Alphakey, and Graduation Year:

- Classes for previous years not marked as Historical
- Students with a Graduation Date but not marked as Graduated
- Students marked as Graduated without a Graduation Date
- Inactive students with an open Entry Record
- Active students without an open Entry Record
- Students with an open Entry Record for one Entity but a different Default Entity

To run the Post Year End Validation Report:

1. Go to Student Management\Office\YE\SY.
2. Select Post Year End Validation Report and click Next.

3. After processing, review the Post Year End Validation Report.

Two versions of the report are produced. The first version is sorted by Student Alphakey, and the second version is sorted by issue. Both versions include the same students.

Best Practice	Clean up any errors identified on the Post Year End Validation Report. If the Classes for previous years not marked as Historical error is received, contact your Information Service Center for assistance.
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Accessing the Year End Status

You can view the status of the areas within the Student Year End Wizard at any time. The screen displays the Date, Start time, End Time, Process, and the User who ran the process. You can access all Wizard areas from any one of the links in the Last Run / Status column.

To access the Year End Status:

1. Go to Student Management\Office\YE\SY.
2. Under the Last Run / Status column on the Wizard Selection screen, click on the [mm/dd/yyyy by username] next to any of the wizards.
3. Select the School Year that you want to view.

Processing Summer School Entities

If you use a Summer School Entity for scheduling purposes only (that is, you do not retain grades, or attendance information, and you delete students from the Entity when the session is over), you don't have to run the full Year End Process on the Entity. In this situation, the Student Year End Process consists of editing the Entity Year Setup (Product Setup\Student Management\ES\CF\EY) and changing the Current School Year box to the upcoming school year. You must also add the Entity Year for the upcoming school year, which includes creating Term Definitions for the Entity.

If you retain grades and/or attendance information in the Summer School Entity, run the Student Year End Wizard (Student Management\Office\YE\SY) as you would for any other Entity.

Use the Student Year End Wizard if any information is being retained in the Summer School Entity. When Students are withdrawn through the Wizard using Step 4 of the Mass Withdrawal (“Would you like to withdraw the remaining students?”), by design the wizard will not inactivate the students. In this case, students do have a Withdrawal Record, but are still active in the Summer School Entity. Instead, consider using the Mass Create of Student Withdrawal Records Utility. This utility creates a Withdrawal Record, and marks the Student Status as Inactive.

Processing Entity 999

If student information, including grade history, is not maintained in this Entity, then the Student Year End Process for Entity 999 consists only of editing the Entity Year Setup (Product Setup\Student Management\ES\CF\EY) and changing the Current School Year box to the upcoming school year. You must also add the Entity Year for the upcoming school year, which includes creating Term Definitions for the Entity. If student information, including grades, is maintained in this Entity, run the Student Year End Wizard (Student Management\Office\YE\SY) as you would for any other Entity.

Processing Student Year End for Entity 000

The Student Year End Wizard for Entity 000 creates the Entity Year and Term Definitions, and increments the school year. Process the Student Year End for Entity 000 after *all* other Entities have processed.



Caution

The district school year is used for displaying the status of the Student Year End Processes. Do not run this option until all other Entities in the district have finished running the final Student Year End Process. See [“Processing Entities in the Correct Order”](#) (page 49) to learn more about the order in which you process Entities.

To process Student Year End for Entity 000:

1. Go to Student Management\Office\YE\SY.

Note

If you have not run any Year End Process that must be run prior to the completion of District Year End, a warning appears in red text on the screen, such as, “Warning: Fee Management Year End has not been completed.”

2. Click Next. The steps for Entity Year, Increment School Year, Gradebook Backups, and Recap and Run appear on the left side of the screen.

3. Click Next.
4. Next to the Entity Year Step 1 question, "Would you like to clone entity year and term definitions?" select Yes or No.
5. Do one of the following:
 - If you selected No in Step 4, click Next again and continue to "[Completing the Calculate GPA Step](#)" (Step 7).



Caution

If you answer No, Entity 000 Term Definitions are not created, and if your district uses Food Service, your district will not be able to load current year Income Eligibility Guidelines. You must then manually create Term Definitions.

- If you selected Yes in Step 4, update the default dates.
6. Click Next.
 7. Select Yes to increment the school year.
 8. Click Next.
 9. Next to the Gradebook Backups Step 1 question "Would you like to mark permanent gradebook backups for removal?" click Yes or No.

Note

Click Yes to change the status of permanent gradebook backups to temporary. This allows them to be deleted from the database through the nightly process as configured in the Gradebook Backup area (Student Management\Educator Access Plus\GB Setup\CF\GB).

10. Click Next to proceed to Step 2.
11. If you clicked Yes in step 9, do the following:
 - a. Click Gradebook Backups.
 - b. Select the Permanent Gradebook Backups that you want to make temporary and therefore available to be deleted.
 - c. Click Save.

12. Click Next.
13. Review the information that appears on the District Year End Wizard Recap screen. Be sure you review the warnings and messages that appear in red text.

Note Entities that have not been processed appear in red text at the bottom of the screen.

14. Click Start District Year End. The following message appears:

“Are you sure you wish to start processing now?”

15. Do one of the following:

- Click Start Processing to proceed.

Note The District Year End process is sent to your Print Queue and processed on the App Server. When processing is complete, you have the option to view a report listing your selections and any results of the process.

- Click No to postpone this process.

Finishing Student Year End Processing

This section explains how you can run the Food Service Price Category Audit Utility and unlock the system to finish Student Year End Processing.

Running the Price Category Audit Prior to Processing Food Service Year Start

If your district uses the Food Service module, setting Price Categories during Student Management Year End eliminates the need for Food Service staff to run the Price Category Audit during Food Service Year Start. This ensures that the Effective Date on the Control Record is prior to any Food Service activity, such as importing Direct Certification applications.

Best Practice	To ensure Food Service Control Effective Dates are populated prior to the start of any Food Service activity for the year, have your Information Service Center or District Coordinator run this audit.
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Note	Run the Price Category Audit <i>only</i> if your district has Entity Defaults set by grade level. For example, K-3, 4-6, and Secondary.
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To run the Price Category Audit prior to processing Food Service Year Start:

1. Select Entity 000 at the top of the screen.
2. Go to Student Management\Food Service\Fs Setup\UT\AU\PC.
3. Configure the Audit FS Entity Default Ranges screen (Figure 2). Table 1 describes the options and recommendations for this screen.

Audit FS Entity Default Ranges

This process will audit the Price Category assigned to all customers in the selected ranges based on the Entity Defaults. This utility will only look at the current Transaction record and either create a new record as of the Effective Date or update the current Transaction record. A preview of the modified records will be shown prior to final processing.

NOTE: If updating the current record it may affect purchase prices and Payor balances.

Template Settings

* Template Description:

Share with other users in entity 000

Utility Ranges

	Low	High
Entity:	<input type="text"/>	<input type="text" value="ZZZZ"/>
Customer Key:	<input type="text"/>	<input type="text" value="ZZZZZZZZZZ"/>
Grad Yr/Grade:	<input type="text" value="0000"/>	<input type="text" value="9999"/>
School:	<input type="text"/>	<input type="text" value="ZZZZ"/>
Student Status:	<input type="text" value="Active"/>	
	<input type="checkbox"/> Update Current Transaction	
* Effective Date:	<input type="text" value="07/01/2020"/>	

Asterisk (*) denotes a required field

Figure 2 - Price Category Audit set to run during Student Year Start for Active students only. The 7/1/2020 Effective Date is only an example, and should be set based on the Food Service Configuration Start Date for your district.

Option	Description
Entity	Range of Entities you want to run the audit for. Best Practice: Leave these fields as defaulted to run the audit for the entire district.
Customer Key	Range of Customers you want to run the audit for. Best Practice: Leave these fields as defaulted to run the audit for all Customers.
Grade/Grad Yr	Range of grade levels or graduation years you want to run the audit for. Best Practice: Leave these fields as defaulted to run the audit for all grade level/graduation years.
School	Range of Schools you want to run the audit for. Best Practice: Leave these fields as defaulted to run the audit for all schools.

Option	Description
Student Status	<p>Customer/student status in the district, Active, Inactive, or Both.</p> <p>Best Practice: Set the Student Status to Active only.</p>
Update Current Transaction	<p>If you select the Update Current Transaction check box, the Customer’s current Customer Control/Transaction Record is overwritten with the new date and price category.</p> <p>Best Practice: <i>Do not</i> select the Update Current Transaction check box. To maintain Customer Control Record History, <i>always</i> create a new record.</p>
Effective Date	<p>Date you want the new price category to become effective.</p> <p>Best Practice: Use the Start Date in the Food Service Configuration (Student Management\Food Service \FS Setup\CF\FS).</p>

Table 1 - Price Category Audit template options

Unlocking the System

Once you verify that all processing is complete, you must unlock the system to allow users to sign in.

To unlock the system:

1. Go to Product Setup\System Administration\SA\UT\LO.
2. In the System Locks area, click Unlock next to each locked system.

Processing Food Service Year Start

Review the following Food Service information as you prepare for the beginning of the school year, and prior to processing any Food Service functions, such as running the Direct Certification Import process or adding applications.

Verifying Food Service Configuration Defaults

Before you do a Direct Certification Import, begin entering applications, or taking payments for the next school year, verify that Food Service Configuration settings are correct.

Best Practice	To ensure all Food Service activity occurs in the appropriate school year, it is extremely important to verify that Food Service Year End has completed, and that the Food Service Year has been advanced in the Food Service Configuration.
----------------------	--

To verify Food Service Configuration defaults:

1. Go to Student Management\Food Service\Fs Setup\CF\Fs.
2. Verify that the year in the School Year box reflects the upcoming school year.
3. Verify that the Start Date and End Date values are for the upcoming school year.

Note	The Food Service Start Date is now set to the date Food Service Year End was processed, and the End Date is set to September 1 st of the following school year.
-------------	--

4. Verify that the values in the Key Pad Options Grad Year/Grade boxes reflect the correct values for the next school year.

Note	If the values in these fields are incorrect, update the values. Food Service uses these ranges to determine who is automatically assigned a Food Service Key Pad number (PIN). If ranges are blank, all grade levels are included.
-------------	--

5. Click Save.

Preparing Food Service for the Next School Year

Your district's Food Service business practices determine which processes you run to prepare Food Service for the next school year. Follow the steps below to determine which processes you should use for your district.

Note You must be in Entity 000 to run these utilities because they are located under Food Service Year End.

To prepare Food Service for the next school year, perform the following tasks in this order:

1. Run the Change Customer Default Cafeteria Utility (Student Management\Food Service\FS\YE\UT\CD). This is typically run for students who move to a new Entity, such as middle school students who move to the high school and need their cafeteria changed.
2. Run the Create Provision 2 Applications Utility (Student Management\Food Service\FS Setup\UT\CR\MP) for CEP Carryover to create applications for students with the correct Lunch Code and Reason Code.

Note To learn how to complete this step, see "[Running the Create Provision 2 Applications Utility](#)" (page 90).



Caution You must complete this step before changing Customer Price Categories.

3. Change the Customer's Price Category. To change the Customer's Price Category, do one of the following:
 - Check to see if the Information Service Center or District Coordinator running Student Year End Processes has run the Price Category Audit as recommended in the Student Year Start Procedures. If the audit has been run, continue to Step 4.
 - If the audit was not run as a part of Student Year Start Procedures, run the Price Category Audit (Student Management\Food Service\FS Setup\UT\AU\PC). See "[Running the Price Category Audit](#)" (page 92) below for procedures and best practices.

Best Practice To ensure the accuracy of Customer Control Records for the start of school, do the following:

- a. Use the Food Service Start Date (Student Management\Food Service\FS Setup\CF\FS) as both the Date for Old Code and the Effective Date.
 - b. Run this utility prior to processing any Direct Certification Imports or Food Service activity.
-

- 4. Run the Customer Price Category/Lunch Code Report (Student Management\Food Service\FS\RE\CP) to check the accuracy of students' Price Categories based on the currently enrolled Entity.
- 5. Load the Income Eligibility Guidelines (Student Management\Food Service\FS Setup\CO\IE) for the next school year.

Note To learn more about updating Income Eligibility Guidelines, see "Loading and Managing Federal Income Eligibility Guidelines" in the *WSIPC Guide to Food Service Administration and Management*.

- 6. Make any necessary price changes in the Item Master. You can do this at any time prior to sales in the next school year (Student Management\Food Service\PU\IM).
- 7. (Optional) Run the Set Customer Barcode Numbers to Zero Utility (Student Management\Food Service\FS Setup\UT\CH\SC).



Caution Run this utility *only* if you want all students to have new barcode numbers and you plan to reprint barcodes for everyone for the next school year.

- 8. (Optional) Run the Delete Customer Key Pad Numbers for Graduated Students Utility (Student Management\Food Service\FS Setup\UT\DE\DC).
- 9. (Optional) Run the Sync Payor Status Audit (Student Management\Food Service\FS Setup\UT\AU\SY).

Note Running the Sync Payor Status Audit prior to the start of school ensures that the Customer and Payor Status match.

10. (Optional) Delete any Payor or Customer Records that should not carry into the next school year (Student Management\Food Service\FS Setup\UT\DE\DS).

Note You must delete Payor or Customer accounts before you enter or create purchases, payments, or tally sheets for the next school year.

Important: Only delete these records based on record retention.

Running the Create Provision 2 Applications Utility

Per OSPI, students who transfer between schools that participate in Provision 2 or Community Eligibility Provision (CEP) may continue to have access to meals at no cost while student eligibility is being determined. Carryover periods allow families time to apply for benefits.

Note This utility is district wide and cannot be defined by Entity.



Caution You must complete this step before changing Customer Price Categories.

To run the Create Provision 2 Applications Utility:

1. Select Entity 000 at the top of the screen.
2. Go to Student Management\Food Service\FS Setup\UT\CR\MP) to create applications for students with the correct Lunch Code and Reason Code.
3. Configure the Mass Create Provision 2 Applications screen (Figure 3). Table 2 describes the options and recommendations for this screen.

Figure 3 - Mass Create Provision 2 Applications screen

Option	Description
Entity	Leave these fields as defaulted to run the utility for the entire district.
Process Students	<p>By Range – Process students by range (for example, select the grade level moving from elementary to secondary). Click Ranges to select range options.</p> <p>By Individual – Select individual students. Click Individual to select students.</p> <p>Best Practice: Select the By Individual option to ensure all necessary students are included.</p>
Effective Date	WSIPC recommends using the day after school ended in the previous school year so when you run the Change Lunch Code by Application Date Utility in the fall, these applications are included if the family has not returned an application in the next school year. This eliminates the need to go back and change these applications manually.
Lunch Code	Select F (Free).

Option	Description
Reason Code	Select the 26 – Carryover option. This indicates eligibility due to transfer from CEP/Provision 2 school to non-CEP/Provision 2 school (10-30 days).
Allow existing applications after effective date	Select this option to ensure you won't override any applications for the current school year.
Allow matching Lunch Codes	Select this option to ensure applications are created even if the student already has an application with a Free Lunch Code.

Table 2 - Options on the Mass Create Provision 2 Applications screen

Running the Price Category Audit

Running the Price Category Audit as a part of Food Service Year Start is only necessary if your Information Service Center (ISC) or District Coordinator did not run the Change Price Category Utility during Student Year Start procedures. Running the audit before any Food Service activity occurs in your district ensures that the Effective Date on the Control Record is prior to any activity, such as importing Direct Certification applications.

Best Practice	To ensure that Food Service Control Effective Dates are populated prior to the start of any Food Service activity for the year, have your ISC or District Coordinator run this audit prior to processing Student Year End/Year Start.
Note	Run the Price Category Audit <i>only</i> if your district has Entity Defaults set by grade level. For example, K-3, 4-6, and Secondary.

To run the Price Category Audit:

1. Select Entity 000 at the top of the screen.
2. Go to Student Management\Food Service\Fs Setup\UT\AU\PC.
3. Configure the Audit FS Entity Default Ranges screen (Figure 4). Table 3 describes the options and recommendations for this screen.

Note	Check the Food Service Configuration for the Start Date. Use this date as the Effective Date when running the Price Category Audit.
-------------	---

Audit FS Entity Default Ranges

This process will audit the Price Category assigned to all customers in the selected ranges based on the Entity Defaults. This utility will only look at the current Transaction record and either create a new record as of the Effective Date or update the current Transaction record. A preview of the modified records will be shown prior to final processing.

NOTE: If updating the current record it may affect purchase prices and Payor balances.

Template Settings

* Template Description:

Share with other users in entity 000

Utility Ranges

	Low	High
Entity:	<input type="text"/>	<input type="text" value="ZZZZ"/>
Customer Key:	<input type="text"/>	<input type="text" value="ZZZZZZZZZZ"/>
Grad Yr/Grade:	<input type="text" value="0000"/>	<input type="text" value="9999"/>
School:	<input type="text"/>	<input type="text" value="ZZZZ"/>
Student Status:	<input type="text" value="Active"/>	
	<input type="checkbox"/> Update Current Transaction	
* Effective Date:	<input type="text" value="07/01/2020"/>	

Asterisk (*) denotes a required field

Figure 4 - Price Category Audit set to run during Student Year Start for Active students only. The 7/1/2020 Effective Date is only an example, and should be set based on the Food Service Configuration Start Date for your district.

Option	Description
Entity	Range of Entities you want to run the audit for. Best Practice: Leave these fields as defaulted to run the audit for the entire district.
Customer Key	Range of Customers you want to run the audit for. Best Practice: Leave these fields as defaulted to run the audit for all Customers.
Grade/Grad Yr	Range of grade levels or graduation years you want to run the audit for. Best Practice: Leave these fields as defaulted to run the audit for all grade level/graduation years.
School	Range of schools you want to run the audit for. Best Practice: Leave these fields as defaulted to run the audit for all schools.

Option	Description
Student Status	<p>Sets the Customer/student status in the district to Active, Inactive, or Both.</p> <p>Best Practice: Set the Student Status to Active students <i>only</i>.</p>
Update Current Transaction	<p>If you select the Update Current Transaction check box, the Customer's current Customer Control/Transaction Record is overwritten with the new date and price category.</p> <p>Best Practice: <i>Do not</i> select the Update Current Transaction check box. To maintain Customer Control Record History, <i>always</i> create a new record.</p>
Effective Date	<p>Date you want the new price category to become effective.</p> <p>Best Practice: Use the Start Date in the Food Service Configuration (Student Management\Food Service\Fs Setup\CF\Fs).</p>

Table 3 - Price Category Audit template options

Processing Fee Management Year Start

To verify that Fee Management Year End ran properly, confirm that the next school year appears in the School Year box.

To process Fee Management Year Start:

1. Go to Student Management\Administration\FM Setup\CF\FM.
2. Verify that the correct year appears in the School Year box.
3. Click Save.

Updating Online Family Access Bill Codes

Districts using Online Family Access Payments for Fee Management must update Payment Bill Codes for the next school year.

Note	Bill Codes must be updated in both Vendor Setup and Entity Configuration.
-------------	---

To update Online Family Access Payments in Vendor Setup:

1. Go to Product Setup\Skyward Contact Access\ST\CF.
2. Next to Online Payment Vendors in the Miscellaneous Settings area, click Vendor Setup.
3. Select a Vendor and click Edit.
4. Click Additional Config.
5. In both the Check box and the Credit Card Payment box, select a Bill Code. This configuration option is used for the XML layout with both RevTrak and e~Funds.
6. Click Save, and then Save again.

To update Online Family Access Payments in Entity Configuration:

1. Select an Entity at the top of the screen.

Note You must update Bill Codes in each Entity that is configured to take Fee Management Online Payments.

2. Go to Student Management\Families\FM Setup\CF\EC\General Information\Fee Management\Family Access Payment Options.
3. In both the Current Year Payment Code box and Next Year Payment Code box, select the appropriate Bill Code used for Family Access entry.
4. Click Save.
5. Repeat steps 1 – 4 for each Entity that is configured to take Fee Management Online Payments.

Processing Special Education Year Start

At the completion of Student Year End, students are enrolled into their new Entities and their grade levels are advanced. This section explains the Special Education Year Start Utilities you run when preparing for the next school year.

Note The following utilities only have to be run if your district enters and maintains Placements on students' IEP Record.

Updating Student Placements

A large part of the Special Education start of year process is making sure the District Services on the students' Placements for the next school year are correct and properly reflect the service, location of service, and provider of service.

During the summer, changes occur both at the school level and at the student level that require students' Placement Records to be updated. The following is a list of the most common reasons why Placement Records may need to be updated on students:

- Students promote to new Entities
- Students transfer/move to new Entity
- Staffing changes: Hires, retirement, or changes to which school staff will provide service
- District Services changes: Addition or removal of services you provide to students or changes in the location of where a service is provided

After your District Services and Special Education Staff Records are updated, cloned, and exist in the 2024 and 2025 School Years, it is time to update students' Placement Records.

There are three ways you can update Placement Records:

- [Running the Maintain Student Placements Utility](#)
- [Adding and Deleting Student Placements Using the District Services](#)

- Updating each student’s Special Education Profile individually to delete and add placements manually

Best Practice Because the third option can take a tremendous amount of resources, it is best to either run the Maintain Student Placements Utility, or remove and add Placements through the District Services List.

This section explains the first two options.

Running the Maintain Student Placements Utility

The Maintain Student Placements Utility allows you to manage Placement Records for groups of students. You can run this utility anytime during the school year, but it is typically used at the start of the school year to move students between a District Service and Provider at one Entity to a different District Service and Provider at another Entity.

Example Fifth grade students were promoted to sixth grade and now attend a different Entity. Therefore, you must move the sixth grade students’ Placements for the next school year from a service and provider at the elementary school Entity to a service and provider at the middle school Entity.



Caution Run class lists before using this utility. By doing so, if you move students to the wrong program, you have a record of the programs they were in.

To run the Maintain Student Placements Utility:

- Go to Student Management\Student Services\SE Setup\UT\MP.

To learn more about the Maintain Student Placements Utility, see “Appendix A” in the *WSIPC Guide to Special Education*.

Adding and Deleting Student Placements Using the District Services Screen

You can also update Placement Records on students while in the District Services screen.

Adding Student Placements Using the District Services Screen

The following procedure shows you how to add a Placement for a student by adding the student directly to the District Services.

To add a Placement to a student using the District Services screen:

1. Select Entity 000 at the top of the screen.
2. Go to Student Management\Student Services\SE Setup\CF\DS.
3. The School Year of the District Services appears in the top left of the screen.



Caution

Each time you enter the District Services screen, the School Year of the District Services default to the current school year. Confirm that the correct School Year is selected before students are deleted from the District Service.

4. Click the arrow to the left of the District Service you are adding students to.
5. In the Students Active in Service area, click Add Student.
6. Locate the student you want to add, and click Select.
7. Configure the Placement Maintenance screen, and click Save.

Note

The District Service that the student is added to is automatically added as a placement on their IEP (Student Management\Student Services\SE\PR\IEP Information).

If the student you are adding does not have a valid IEP for the school year selected, you a message indicates that you cannot add the service.

Deleting Students by Using the District Services Screen

The following procedure shows you how to delete a Placement for a student by deleting the student directly from the District Service.

To delete a Placement from a student using the District Services screen:

1. Select Entity 000 at the top of the screen.
2. Go to Student Management\Student Services\SE Setup\CF\DS.

3. The School Year of the District Services appears in the top left of the screen.



Caution

Each time you enter the District Services screen, the School Year of the District Services default to the current school year. Confirm that the correct School Year is selected before students are deleted from the District Service.

4. Click the arrow to the left of the District Service you want to remove students from.
5. Click the arrow to the left of Students Active in Service area.
6. Click the Delete link directly to the left of the student you want to remove.

Updating the IEP/Case Manager

The Update IEP/Case Manager Utility updates the Case and/or IEP Manager to match the teacher listed as the Primary Teacher on the student's *primary* Placement Record.



Caution

Do *not* run this utility if your district manually assigns the Case Manager or IEP Manager. Otherwise, your values are overwritten with the Primary Teacher found on the student's primary Placement.

To ensure that the Case Managers and/or IEP Managers are assigned based on the student's most up-to-date placement, run this utility after students have been enrolled in their new placements.

To run the Update IEP/Case Manager Utility:

- Go to Student Management\Student Services\SE Setup\UT\UI.

Note

The school year you enter on the Update IEP/Case Manager Utility screen determines which of the students' Primary Placement Records are used to assign the IEP/Case Manager.

Updating Service/Program Dates

The Update Service/Program Dates Utility updates the Begin Date and End Date of the selected District Services and Programs. The utility also updates the Begin Date and End Date on students' Placement Records.

If you have Special Education Staff that are assigned to the District Services, you are updating and you want to update the Start Date and End Date on the Staff Assignments, select the Update Staff Assignment Dates option.

To run the Update Service/Program Dates Utility:

- Go to Student Management\Student Services\SE Setup\UT\UP.

Updating the Student's Special Education School

The Special Ed School box is located on the student's Evaluation tab and is used to identify the school where the student receives their Special Education services. The Update Student's Spec Ed School Utility updates the Special Education School box, with the Building value found on the student's primary Placement Record.

Best Practice	Because students are promoted from one school to another during the summer, run the Update Students Spec Ed School Utility after you promote the students.
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The Special Education Configuration option (Student Management\Student Services\SE Setup\CF\SE) Always update Special Ed School from Primary Placement must be selected before you can run this utility.

To run the Update Student's Special Education School Utility:

- Go to Student Management\Student Services\SE Setup\UT\US.

Note	The school year you enter on the Update Students Spec Ed School Utility screen determines which of the students' primary Placement Records are used to assign the Special Ed School.
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Running the Update Service Enrollment Numbers Utility

Each District Service has a Size column on the District Services screen (Student Management\Student Services\SE Setup\CF\DS) and the value in the Size column indicates the number of students enrolled in the District Service.

The Update Service Enrollment Numbers Utility updates the enrollment counts for the District Services by processing through students' Placement Records for the

school year entered on the utility range screen, and makes any necessary updates to the Size (enrollment) counts on the District Services.

To run the Update Service Enrollment Numbers Utility:

- Go to Student Management\Student Services\SE Setup\UT\UD.

Processing Gradebook Year Start

Review the following Gradebook information as you prepare for the beginning of the school year.

Mass Delete Assignment/Event Grade Change History

Each time a teacher changes a score on an assignment for a student in Gradebook, Gradebook automatically records the change. The score change history from previous years is not useful and can contain a large number of records. The Mass Delete Assignment/Event Grade Change History Utility deletes these records.



Caution Perform this process *after* running the Student Year End Wizard.

To delete Gradebook score change history:

1. Go to Student Management\Educator Access Plus\GB Setup\UT\SC.
2. Select the check box next to a school year and click Mass Delete Selected. The following message appears:

"Are you sure you want to delete all of the Assignment/Event grade change history from the selected years?"
3. Click OK.

The process is added as a Scheduled Task in the District Print Queue and runs in the evening. Depending on the number of records, it may not finish by morning. If it does not finish by morning, it resumes the following evening. After all records are deleted, the process is automatically removed from Scheduled Tasks.

Cloning Report Card Layouts and Setup Templates

The following pre-defined and custom Report Card layouts are year specific:

- Standards Based Custom Report Card layouts
- District Report Card Setup templates

You must clone them to the next school year.

To clone Report Card layouts and Setup templates:

1. Go to Student Management\Office\GR\RC Setup\CF\SB\CL to clone the Standards Based Custom Report Card layouts.
2. Go to Student Management\Office\GR\RC Setup\CF\DR\RC to clone District Report Card Setup templates.

Note You do not need to clone District Custom Report Card Layouts or Basic Standards Report Card Parameters because they are *not* year-specific.

Cloning Academic Areas

You must clone Academic Areas as part of Student Year Start.

To clone Academic Areas for next year:

- Go to one of the following areas:
 - Student Management\Educator Access Plus\GB\ST Setup\UT\AY.
 - Student Management\Office\YE\YU\EU\SD\AY.

Cloning Survey Questions

Survey questions are entity specific and if they are used, they must be cloned each year.

To clone survey questions:

- Go to one of the following areas:
 - Student Management\Educator Access Plus\SU Setup\UT\SQ.
 - Student Management\Office\YE\YU\EU\EA\SQ.

Note	Survey questions with Teachers as Respondents are cloned. However, Respondents are cleared and the Status becomes Inactive. Edit the survey question for the next year before the start of school so that it is accessible in Educator Access Plus.
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Cloning Activity Types

If your district uses the Lesson Plans Module and uses Activity Types, consider cloning them at the beginning of each next school year. The Clone Activity Types to New Year Utility allows you to clone the Activity Type Codes from one school year to another. You can run this utility from any Entity. To learn more about Lesson Plans and Activity Types, see the *WSIPC Guide to Lesson Plans Administration and Management*.

To run the Clone Activity Types to New Year Utility:

1. Go to one of the following areas:
 - Student Management\Educator Access Plus\LP Setup\UT\NY.
 - Student Management\Office\YE\YU\EU\EA\NY.
2. In the Clone From box, select the school year you want to clone the Activity types from.
3. In the To box, select the school year you want to clone the Activity Types to.
4. Do one of the following:
 - To clone all of the Activity Type Codes from the school year you selected, select All Activity Types.
 - To clone specific Activity Type Codes, do the following:
 - i. Select Selected Activity Types.
 - ii. Click Activity Types.
 - iii. Select the Activity Type Codes you want to clone and click OK.
5. Click Run.

Cloning Comments Plus for Next Year

If your Entity wants to use the same Comments Plus, or Comments Plus and Special Codes, from one year to another, you can use the Clone Comments Plus for New Year Utility.

To run the Clone Comments Plus for the New Year Utility:

1. Select the Entity you want to clone your Comments Plus from.
2. Go to one of the following areas:
 - Student Management\Educator Access Plus\EA Setup\UT\CC.
 - Student Management\Office\YE\YU\EU\EA\CP.
3. Click Clone Comments Plus for New Year.
4. Click Clone.
5. On the Comments Plus Clone Year End screen, do one of the following:
 - Select Clone Comments Plus and Special Codes.
 - Select Clone Comments Plus Only.
6. Click the arrow to the right of From School Year and select a school year.

Note	The To School Year box automatically defaults to the next school year and cannot be changed.
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7. If you want to overwrite existing Comments Plus and Special Codes, select Overwrite Existing Comments Plus and Special Codes.
8. Click Run.

Preparing Data after the Year End Wizard for the Start of School

This section discusses a recommended list of tasks for you to perform after you run Student Year End Processes and Student Year Start, and before the beginning of the next school year. This list is not comprehensive, and you may want to add district-specific items to it.

Preparing Attendance and Calendar Information

Review the following Attendance and Calendar information as you prepare for the beginning of the school year.

Reviewing the Calendar

It is important to review the Calendar to ensure that the dates are correct and that term dates do not overlap. Invalid dates can cause attendance entry problems.

To review the Calendar:

1. Go to Student Management\Office\AT Setup\CO\CC.
2. Confirm that calendars in the Calendar Master list do not have overlapping date ranges.
3. Confirm the method used on the Calendar Master.

Best Practice	Use the Schedule method for your Calendar Master. This ensures accurate attendance calculations and reporting.
----------------------	--

4. Confirm that all Calendar Terms have legitimate dates and date ranges.
5. Confirm that Calendar Detail is configured to accurately reflect district business policy regarding half and full day absences.
6. Confirm that there are 180 days in each calendar (using the Days button).

7. Confirm that each day has a count value equal to either zero or one.
8. Repeat steps 1 through 7 for each Entity.

Verifying That Percent Enrolled in Absence Calculation is Cleared

A student's percent enrolled is a factor when calculating what constitutes a full day's absence.

Example If students have a percent enrolled of 50% because they attend only 3 of 6 periods, and they are absent all three of these periods, reports would only show them as having missed a half day if you select the Use Prc Enrl In Membership\Days Absent Calculation option. Therefore, you should *not* select this option.

Because these settings carry forward during Student Year End Processing, you do not need to perform this task unless you are verifying that the option is not in use, or if you are making a change from the previous year.

To verify that percent enrolled in absence calculation is cleared:

1. Go to Product Setup\Skyward Contact Access\DS\CF\ST.
2. Select Student Configuration.
3. Confirm that the Use Prc Enrl In Membership\Days Absent Calculation check box is cleared.

Updating Attendance Report Templates

Update Attendance Report templates that include a specific date range, or reference a specific Calendar.

Specific reports to update include, but are not limited to:

- Daily Reports (Student Management\Office\AT\RE\AR\DR)
- Monthly Quarterly Report (Student Management\Office\AT\RE\AR\MQ)
- Attendance Detail or Summary Report (Student Management\Office\AT\RE\AR\AD)

Considerations if Using Attendance Letters

Most of the components used to generate Attendance Letters are not year specific and are present from year to year with no need to update them. For example, Thresholds, Letter Attendance Types, Custom Attendance Letters and the Templates used to update and generate the letters themselves. However, Date Ranges and Schedule Letters tasks are year-specific and you must update them to the current school year.

To ensure the Attendance Letters reflect the correct School Year and Date, this section explains how to review the Date Range and how to update Schedule Letters tasks.

Creating a Date Range for the Current School Year

Date Ranges are year specific. Therefore, if you are using Thresholds with a Term of Date Range, you must create a new Date Range Record. Once you create a new Date Range, you must associate it with your Update Template and Letter Template.

To create a Date Range for the current school year:

1. Go to Student Management\Office\AT\AL Setup\CO\DR.
2. Create the desired Date Range with dates within the next school year.

Note	When creating the Code for a Date Range, take care to use a unique, non-system-defined Term Literal. If you use a system-defined Term Literal such as YR, S1 or S2 you cannot select the code on the Update Template or the Letters Template.
-------------	---

3. When you have created a Date Range for the next school year, do the following:
 - a. To associate your new Date Range with your Update Template, go to Student Management\Office\AT\AU.
 - b. To associate your new Date Range with your Letter Template, go to Student Management\Office\AT\AL.

Note	Associate the new Date Range with each Letter Template that uses a Threshold with a Term of Date Range.
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Updating Schedule Letters Tasks

If you use Schedule Letters rather than generating Attendance Letters manually, you must update the Date Range associations and the school year on Discipline Records.

To update Schedule Letters Tasks:

1. Go to Student Management\Office\AT\AL\SL.
2. Select a Task.
3. Review the Sched Params screen. Update the dates in the Task Information area as needed.
4. Review the Update Params screen. Click Edit to update the Term and Starting Attendance Dates as needed.
5. Review the Letters Params screen. Click Edit to update the Term.
6. Repeat steps 2 through 5 for all Schedule Letters Tasks.

Year Start Actions for Inactive Entities

When an Entity is closed and no longer has active students enrolled, do not remove it from the list of Entities. This allows you to access historical data. However, if you do not take certain actions when a next school year begins, errors can occur when accessing grading information for a student (in areas such as the Grades tab, GPA tab, Grade History Report, or running a WA State Transcript). These errors typically affect students who were not re-enrolled in another active Entity in the district.

Note	Run Student Year End procedures for the last school year that the Entity is active. It is not necessary to run Student Year End procedures on an inactive Entity for subsequent years, but it is necessary to include inactive Entities in the Year Start considerations.
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To complete start of year actions for Inactive Entities:

1. Go to Student Management\Office\CS Setup\CF\SE and verify that Entity Year exists for the current school year. To learn more about this process, see "Future Year Scheduling Setup and Codes – Entity Year and Term Definitions" in the *WSIPC Guide to Future Scheduling: Part One - Preparing to Schedule*.
2. Go to Scheduling Setup (Student Management\Office\FS Setup\UT\CE) and create the Entity Year for the current school year if it does not exist.

3. Select Clone Entity Year and Term Definitions and create the current school year and Term Definitions. To learn more about this process, see "Clone the Entity Year and Term Definitions" in the *WSIPC Guide to Future Scheduling: Part One - Preparing to Schedule*.
4. To exclude Inactive Entities from State Reporting, go to Student Management\Office\Current Scheduling Setup\CF\SE and do the following:
 - a. Expand the School Year Record you want to exclude.
 - b. Click Edit Entity Year Options.
 - c. Select the Exclude from State Reports check box (Figure 5).

Figure 5 shows the Exclude from State Reports option. The option is Entity Year-specific, so it allows you to run reports on historical years when the Entity was valid.



Caution

If you are closing an Entity, after Student Year End has been processed, select this option to exclude the Entity from State Reports. You only need to do this in the Entity Year Options area for the first year the Entity is closed.

Figure 5 - Exclude from State Reports check box on the Entity Year Options screen

Preparing Student Demographics

This section explains the tasks you perform in Student Demographics as you prepare for the beginning of the school year.

Running the Student Current Year Member Mass Change Utility

Run this utility at the beginning of the year to update the Current Year Member box (located on the Entity Info sub-tab under the Entity tab in Student Profile) for students who withdrew the previous year. Students who withdraw during the current school year must be flagged as a Current Year Member so that Attendance Reports can be generated for them. However, once Student Year End occurs, you must update the status of these students because they are no longer Current Year Members. If you do not use this utility to update the Current Year Member flag, these students have a line item of zero attendance for the school year, when they were not actually enrolled during the school year. To learn more about this utility, see "Student Current Year Member Mass Change" in the *WSIPC Guide to Student Demographics and Families*.

To run the Student Current Year Member Mass Change Utility:

1. Go to Student Management\Students\ST Setup\UT\MM.
2. Run the utility for each Entity.

Running the Mass Change LEP for Continuing Students Utility

This utility is used to mass update records for English Learners (Limited English Proficiency - LEP) students who are continuing in the program from one school year to the next. You should run this utility only after all of the Student Year End processes and Year Start Utilities have been completed. This ensures that students who change Entities during the year-end process have an LEP Record for the correct Entity. You must run this utility from an Entity other than 000.

Note	OSPI's CEDARS requirement states that all students reported have a program start date of the first day of the school year if they are continuing from the previous school year. This utility was developed to provide an easier method to accomplish this requirement.
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Best Practice	Be sure to exit those students who are not continuing in the program, such as those who tested out or are leaving the district, prior to running this utility.
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To run the Mass Change LEP for Continuing Students Utility:

1. Go to Student Management\Students\ST Setup\UT\NU\MC.
2. Click Add.
3. In the Template Description, enter a name for your utility.
4. In the Student Selection Ranges area, select the ranges you want to use.
5. In the Existing LEP Fields area, do the following:
 - a. Enter an end date in the End Date for the previous school year LEP Record.
 - b. (Optional) Enter a comment in the Exit Comment box.
6. In the New LEP Fields area, do the following:
 - a. Enter a start date in the Start Date for the next school year LEP Record.

Note	For the continuing LEP students, the Start Date is the first day of the current school year.
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 - b. (Optional) Enter a comment in the Entry Comment box.
7. Click Save and Process.
8. Click Preview Data to Process and do the following:
 - a. Review the records.

Note	Select any record that should not be updated and click Remove From Update.
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 - b. Click Back.
9. Click Run the Update.

Running the Mass End and Mass Add Special Programs Utility to Maintain LAP and WRC Records

Students enrolled in a Learning Assistance Program (LAP) with a Program Code of 6, 7, 37, or 38 or those enrolled in Washington Reading Corps Literacy Support (Program Code 44) must have their Special Program Records ended and started each school year so that Student Growth Data can be entered per school year. Use the Mass End Special Programs and Mass Add Special Programs Utility to do this.

Best Practice First, create a Processing List (using Data Mining) of students who have a Special Programs Lrn Ast Prg Record with a Program Code of 6, 7, 37 or 38 or an Oth WA Prg Record with a Program Code of 44 with no End Date. You must verify that these students are continuing in these programs in the next school year; if they are not, do not include them in your Processing List.

Create a separate Processing List for *each* Program Code. This makes the Mass Add Special Programs process easier.

Running the Mass End Special Programs Utility

To run the Mass End Special Programs Utility to maintain LAP and WRC Records:

1. Go to Student Management\Students\Student Setup\UT\NU\ME.

Note If records for Program Code 6, 7, 37, 38 and 44 were already withdrawn through the Year End Student Program Withdrawals Wizard and you only need to add new records for students who are continuing in the program, skip to Step 1 of "[Running the Mass Add Special Programs Utility](#)" (page 115).

2. Click Add to add a new template.
3. In the Student Selection box, select By Processing List. Choose one Program Code Processing List that was created.

Note You will run the Mass End Special Programs Utility up to 5 times so that you can end records for Program Code 6, 7, 37, 38 and 44 separately. If you do not offer one of those programs, then you will not run the utility to mass end records for that Program Code.

4. In the Programs to End box, select one of the applicable Program Codes.
5. Click Save and Process.
6. Click Preview Data to Process.
7. Do the following:
 - Review the records.

Note	Select any record that should not be updated, and click Remove From Update.
-------------	---

- Click Back.
8. Click Run the Update.
 9. Repeat steps 2-7 until all applicable program codes have been processed.

Note	When repeating step 2 you can add a new template or edit an existing template.
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Running the Mass Add Special Programs Utility

To run the Mass Add Special Programs Utility to maintain LAP and WRC Records:

1. Go to Student Management\Students\Student Setup\UT\NU\SP.
2. Click Add to add a new template.
3. In the Student Selection box, select By Processing List. Choose one Program Code Processing List that was created.

Note	Run the Mass Add Special Programs Utility up to 5 times so that you can add records for Program Code 6, 7, 37, 38 and 44 separately. If you do not offer one of those programs, then you will not run the utility to mass add records for that Program Code.
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4. In the Programs to Add box, chose the Special Program Lrn Ast Prg or Oth WA Prg, depending on the Program Code Processing list that was selected in step 3.

5. Configure the Common Values to Assign area.
6. Configure the Learning Assistance Program Values to Assign or the Other Washington Program Values to Assign area depending on what program you're adding records for.

Note The name of these areas is dependent upon the selections you make in the Programs to Add area.

7. Click Save and Process.
8. Click Preview Data to Process and do the following:
 - Review the records.

Note Select any record that should not be updated, and click Remove From Update.

- Click Back.
9. Click Run the Update.
 10. Repeat steps 2-9 until all applicable Program Codes have been processed.

Note When repeating step 2 you can add a new template or edit an existing template.

Running the Mass Delete Student Categories from Students Utility

Student Categories can be either Entity-specific or district-specific. You maintain these categories on the Categories tab in Student Profile. If Categories change on a student from one year to the next, you can delete them using this utility.

The Mass Delete Student Categories from Students Utility deletes Student Category Codes from the students that you do not want to preserve from year to year. You can perform this delete process based on Category Type or Category Code and Entity Categories, District Categories, or both.

Note You must be in an Entity other than 000 to access the Mass Delete Student Categories from Students Utility.

To run the Mass Delete Student Categories from Students Utility:

1. Go to Student Management\Office\YE\YU\FS.
2. Do one of the following:
 - Select an existing template and continue to step 7.
 - Click Add to add a new template and continue to step 3.
3. In the Category Type boxes, enter the Category Type or range of types to delete.
4. In the Category Code boxes, enter the code or range of codes to delete.
5. Configure the Start Date Range for Record Selection, Exit Fields to Assign, and Learning Assistance Program Values to Assign.
6. Click Save and Process
7. Click Preview Data to Process and do the following:
 - Review the records.

Note	Select any record that should not be updated and click Remove From Update.
-------------	--

 - Click Back.
8. Click Run the Update.
9. Select one of the Delete From options:
 - Categories/Entity
 - Categories/District
 - Both
10. Select either By Range or By Individual in the Student Selection area.
11. Do one of the following:
 - If you selected an existing template in step 2, click Save.
 - If you added a new template in step 2, click Save and Process.

12. Click **Preview Data to Process** and do the following:

- Review the records.

Note	Select any record that should not be updated and click Remove From Update .
-------------	--

- Click **Back**.

13. Click **Run the Update**.

A report shows the counts of students who were deleted from each of the **Category Type and Code**.

Running the Mass Delete Student Category Codes Utility

The **Mass Delete Student Category Codes Utility** deletes **Student Category Codes** that you do not want to use next school year. For example, if you create a **Student Category Code** to track the type of cell phone carrier that students use, and you decide to no longer track this information, you can use this utility to delete those **Student Category Codes**. This utility deletes the selected codes from the students as well as the **Category Code Table**.

Note	You must be in an Entity other than 000 to access the Mass Delete Student Categories Codes Utility .
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To run the **Mass Delete Student Category Codes Utility**:

1. Go to **Student Management\Office\YE\YU\CC**.
2. Select the **Category Codes** you want to delete.
3. Click **Delete Selected Categories**.

A report shows which **Category Codes** were deleted.

Running the Separate Graduated Students from Families Utility

The **Separate Graduated Students from Families Utility** removes graduated students from all families that they are attached too. All students enrolled in the Entity with a

graduation year within the ranges are processed. If there are no other students in a family, that family and its associated guardians are removed. The guardian Name Record is retained in the Name Maintenance Table.

Before graduated students are separated from families, you can preview the records and remove any records that you do not want updated. Using this utility is optional. You can run it from any Entity at any time, including prior to and after running Year End.

To run the Separate Graduated Students from Families Utility:

1. Go to Student Management\Families\FA setup\UT\SG.
2. Do one of the following:
 - Select an existing template.
 - Click Add to add a template.
3. If you are running this utility from Entity 000, in the Student Ranges area, enter the Entity Low and High values to be processed.
4. In the Student Ranges area, enter the Grad. Year Low and High values to be processed.

Note The Grad. Year High cannot be the current School Year.

5. The Process Only If Student's Default Entity check box is selected by default. If you want to include students enrolled in the Entity selected, but it is not their Default Entity, clear the Process Only If Student's Default Entity check box.
6. The Include All Student Types option is selected by default. If you don't want to include all Student Types, do the following:
 - a. Clear the Include All Student Types option.
 - b. Click Student Types.
 - c. Select the Student Types to process.
 - d. Click Save.
7. Click Save and Process.

8. Click Preview Data to Process and do the following:

a. Review the records.

Tip

Select any record that should not be updated and click Remove Record.

Click Report to run a report showing the actions that will be taken for each student.

b. Click Back.

9. Click Run the Update. A report shows the actions taken.

Saving Report Templates

Each user must update and save any report templates that have School Year or Grade/Graduation Year parameters.

Updating Calendars for Elementary Entities

When reviewing student demographics information, you must update all students who may have been assigned a different calendar than in previous year based on their grade level. This is typically first grade students who were assigned a kindergarten calendar the previous year, but it can also apply to other situations.

You can update Calendars for students in elementary Entities by withdrawing the students and creating a New Entry Record. This can be done by using the Mass Create of Student Withdrawal Records and the Mass Create of Student Entry Records Utilities. This section guides you through this process.

Updating Calendars by Creating a New Entry/Withdrawal Record

Creating a new Entry/Withdrawal Record allows you to retain a Historical Record of when a student moved from one Calendar to another. When you create Status Change Records to update the Calendar, the GLO box is reset to blank when the Entry Record is created. To learn more about the GLO (Grade Level Override), see ["Clearing the Elementary GLO from Student Profile."](#)

Note

It is important to retain Calendar and GLO information on the Entry/Withdrawal Record for State Reporting purposes.

Updating student Calendars by creating a status change Entry/Withdrawal Record is a two-step process. You must create the Withdrawal Record using the Mass Create of Student Withdrawal Records Utility. You must then create the Entry Record using the Mass Create of Student Entry Records Utility. To learn more about these utilities, see "Mass Create or Delete of Student Entry/Withdrawal Records Utilities" in the *WSIPC Guide to Student Demographics and Families*.

To update Calendars by creating a new Entry/Withdrawal Record:

1. Create the Withdrawal Record using the Mass Create of Student Withdrawal Records Utility:
 - Go to Student Management\Students\ST Setup\UT\SW.
2. Create the Entry Record using the Mass Create of Student Entry Records Utility:
 - Go to Student Management\Students\ST Setup\UT\SE.

Note When creating a Status Change, there cannot be a gap between the Withdrawal date and the Entry date. This allows the records to be linked together for State Reports. This requirement is the same when creating a Status Change for an individual student or when using the utilities to mass create the Status Change for many students.

Clearing the Elementary GLO from Student Profile

If an elementary Entity used a value of K2 for State Reporting purposes, you can clear the GLO box (Student Management\Students\ST\PR\General tab\Profile sub-tab) for the now first grade students using the Student Mass Change Utility. To learn more about this utility, see "Student Mass Change" in the *WSIPC Guide to Student Demographics and Families*. Alternatively, you can clear the GLO on the individual Student Profile Records manually.

Note When you create status change Entry/Withdrawal Records to update the Calendar, the GLO is reset to blank when the Entry Record is created, however it is not removed from the Student Profile GLO box.

To clear the elementary GLO from Student Profile:

- Go to Student Management\Students\ST Setup\UT\MC.

Clearing Advisor and Homeroom Boxes

If the Advisor and/or Homeroom boxes (Student Management\Students\ST\PR\Entity tab) for active students must be updated with current school year information, you can clear the boxes using the Student Mass Change Utility. To learn more about this utility, see "Student Mass Change" in the *WSIPC Guide to Student Demographics and Families*.



Caution

Be careful when updating Advisor and Homeroom. This is typically done each year in an elementary school, but may not be the business practice at a middle school or high school. Scheduling personnel may still use these fields for the incoming class. Check with your scheduling personnel before you clear the Advisor and Homeroom boxes.

To clear Advisor and Homeroom boxes:

- Go to Student Management\Students\ST Setup\UT\MC.

Mass Assigning Advisors

You use the Mass Assign Student Advisors by Course or Class Period Utility to assign advisors to multiple students at the same time. Run this utility to assign new advisors to students.



Caution

Use caution when updating the Advisor box. This is typically done each year in the elementary school, but may not be the business practice at the middle or high school.

To learn more about the Mass Assign Student Advisors by Course or Class Period Utility, see "Mass Assign Student Advisors by Course or Class Period" in the *WSIPC Guide to Student Demographics and Families*.

To mass-assign advisors:

- Go to Student Management\Students\ST Setup\UT\SA.

Mass Assigning Homerooms

The Mass Assign Student Homeroom Utility looks at a student's schedule and the specifications selected in the template to assign the homeroom. Homerooms can be updated by Course/Class, Period and Term, as well as for both current and next year.



Caution Use caution when updating the Homeroom. This is typically done each year in an elementary school, but may not be the business practice at the middle or high school.

To mass-assign homerooms:

- Go to Student Management\Students\ST Setup\UT\SH.

Mass Clearing AUP

You use the Mass Clear AUP (Acceptable Use Policy) Utility to reset the AUP box to Not Approved and to clear the Modified Date/By boxes for all or selected students. This is helpful if you require students to acknowledge the district's acceptable use policy on an annual basis. It is also helpful when students advance to a new Entity. To learn more about the Mass Clear AUP Utility, see "Mass Clear AUP (Acceptable Use Policy)" in the *WSIPC Guide to Student Demographics and Families*.

To mass-clear AUP:

- Go to Student Management\Students\ST Setup\UT\AU.

Preparing Current Year Scheduling

Scheduling Transaction Records are used throughout the software to indicate when a student was enrolled in or dropped a class. These Scheduling Transaction Records are used for creating Attendance Records, Fee Management Records, and Grading Records.

Running the Mass Create Initial Add Scheduling Transactions Utility

If you did not create Scheduling Transaction Records when generating students' schedules prior to the start of the next school year, you can do so at this time. The Mass Create Initial Add Scheduling Transactions Utility processes all current year student classes and creates an initial Add Transaction Record for classes that do not have an existing Scheduling Transaction Record. To learn more about this utility, see "Mass Create Initial Add Scheduling Transactions" in the *WSIPC Guide to Current Scheduling*.

Best Practice	The Mass Create Initial Add Scheduling Transactions Utility was created for states that require Scheduling Transaction Records for State Reporting. Even though Washington State does not use the Effective Date from Scheduling Transaction Records for State Reporting purposes, running the utility is one way to preserve the attendance for non-graded classes at the end of the school year.
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Best Practice	Run this utility as close to the first day of school as possible. You can only run this utility with a date on or after the first day of school.
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To run the Mass Create Initial Add Scheduling Transactions Utility:

1. Go to Student Management\Office\CS\SS Setup\UT\AT.
2. The first day of school defaults into Effective Date box. Although you can change the date, using the first day of school is recommended.

Note	The date displayed as First Day of School is the Start Date found on the Calendar Master for the Entity's current year default calendar (Student Management\Office\AT Setup\CO\CC).
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3. Click Run.

Running the Historical Class History Grad Year Correction Utility

The Historical Class History Grad Year Correction Utility is used to identify and correct historical (HST) Student Class History Records that contain grade levels that do not match the student's grade level for the corresponding school year. It also identifies students with discrepancies in Entry/Withdrawal Records, but does not correct the discrepancies. Using this utility is optional. It can be run from any Entity at any time, including prior to and after running Year End, and includes all Entities.

The Historical Class History Grad Year Correction Utility is a two-part process. When you run this utility, you are first provided with a preview of the records. You can then exclude students that you do not want to process, run all the selected students, or leave the utility without processing any of the students.



Caution

Not all records identified in the utility are necessarily incorrect. For example, students who have mid-year promotions/retentions may have records for multiple grade levels in the same year.

Review and research each identified record prior to including it in the second part of the process. All changes made are permanent and cannot be programmatically undone.

To run the Historical Class History Grad Year Correction Utility:

1. Go to Student Management\Office\YE\YU\Historical Class History Grad Year Correction.
2. Click Add and enter a name for the template.
3. Select Save or Save and Process. (There are no parameter selections.)
4. When the preview step of the utility is complete, click Preview Data to Process.

Note

When the preview step has completed, a printable report is immediately available in your Print Queue. It is not necessary to click Preview Data to Process to get the report.

The preview report helps you research and make manual corrections to records, as opposed to running the corrections through the second step of this utility.

5. Expand each record to view the correction that will be made if left in the update.
6. To remove a record from the update, select it and click Remove from the update.
7. When you finish reviewing records in the preview, click Back.
8. Do one of the following:
 - To process the records that remain in the preview, do the following:
 - i. Click Run the Update. A message appears warning that the changes are permanent.
 - ii. Do one of the following:

- Click **OK** to proceed.
- Click **Cancel** to leave without running the process.
- To exit the utility without processing any records, click **Back**.

Tip A report of records that the utility updated is available in your Print Queue for your review.

Preparing Grading Information

To prepare for grading in the next year, review your grading setup to be sure it represents how grading will occur in the next school year.

Reviewing Grading Setup

Ensure that only the appropriate Course Length Sets (such as Term, Semester, and Year) and Grade Sets exist. Delete any you no longer use.

To review the Grading Setup:

- Go to Student Management\Office\GR Setup\CF\GS\CL.

To learn more about Grading Setup options, see the *WSIPC Guide to Grading Setup*.

Preparing Discipline Information

Reviewing Discipline information as you prepare for the beginning of the school year includes configuring Suspension/Expulsion to Attendance options.

Configuring Suspension/Expulsion to Attendance Options

If the Entity uses Suspension/Expulsion to Attendance options, you must configure these settings each year. They are not cloned in Student Year Start Utilities.

To configure Suspension/Expulsion to Attendance options:

- Go to Student Management\Office\DI Setup\CF\SE.

To learn more about these options, see "Setting Up Suspension/Expulsion to Attendance Options" in the *WSIPC Guide to Discipline*.

Preparing Health Records

Reviewing Health Records as you prepare for the beginning of the school year includes checking the Vaccination Configuration.

Checking Vaccination Configuration

To be sure students ages are calculated correctly for immunization reporting, check the Vaccination Configuration in the Health Records module. Vaccination Configuration is a District wide value, however, you can access it for verification from any Entity. To learn more about this configuration, see "Vaccination Configuration" in the *WSIPC Guide to Health Records*.

Note	The ages for all students should calculate from the current date. Once the Age Effective Date option is configured, the selection remains from year to year.
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To check the Vaccination Configuration, from any Entity:

1. Go to Student Management\Office\HR\VA Setup\CF\VA.
2. Ensure the Age Effective Date option is set to Use Today's Date.

Year Start Validation Reports

This section explains the three Year Start Validation Reports you can run. These reports are Entity specific.

Running the Year Start Course Validation Report

After you process Year End, you may want to verify that course, section, and calendar information is valid. The Year Start Course Validation Report verifies that all courses, class sections, and calendars for the Entity are set up and ready to take attendance and track grades. If errors are found, the report provides instructions on how to correct them. It is up to the user to determine if the error or warning needs to be corrected and to perform the necessary changes.

To run the Year Start Course Validation Report:

- Go to Student Management\Office\YE\YU\RE\YC.

Table 4 lists the areas and types of validations that occur in the Year Start Course Validation Report.

Report Area	Validations
Course Validations	<ul style="list-style-type: none"> ▪ Courses have Sections assigned ▪ Courses have valid Course length sets ▪ Courses have valid GPA Sets assigned ▪ Courses have Earned Credits and GPA Credits ▪ Courses have Curriculum Records attached ▪ Course Sections have valid Calendars ▪ Course Sections have valid Control Sets ▪ Class Meets have valid start and stop terms ▪ Class Meets have teachers assigned ▪ Course Sections with teachers assigned have a primary teacher ▪ Teachers have access to Gradebook ▪ Teachers have access to Educator Access Plus ▪ Teachers with access to Educator Access Plus have access to Gradebook
Calendar Validations	<ul style="list-style-type: none"> ▪ Calendars have days set up ▪ Calendar master ranges are valid ▪ Calendar term ranges are valid ▪ Class Control Sets have valid date ranges ▪ Grading Periods have valid date ranges
Attendance Validations	<ul style="list-style-type: none"> ▪ Absence Type Codes exist ▪ Teacher Attendance Codes are specified
Grading Validations	<ul style="list-style-type: none"> ▪ Grade Sets are valid ▪ Grade Marks are set up ▪ Grade calculation values are greater than zero ▪ GPA points are greater than zero
Gradebook Validations	<ul style="list-style-type: none"> ▪ Category Groups for Secondary Gradebook are set up ▪ Grade Mark Groups for Secondary Gradebook are set up ▪ Courses attached to an academic area have default Grade Mark Groups ▪ Subjects/Skills in the Standards Gradebook have Grade Mark Groups ▪ Category Groups in Standards Gradebook have categories

Table 4 - Validations included in the Year Start Course Validation Report

Running the Year Start Student Validation Report

After you process Year End, you may want to verify that student enrollment and Default Entity information is correct. The Year Start Student Validation Report verifies student enrollment and scheduling data. If errors are found, the report provides instructions on how to correct them. It is up to the user to determine if the error or warning needs to be corrected and to perform the necessary changes.

The following areas are validated in the Year Start Student Validation Report:

- Students are active in their Default Entity
- Students have valid enrollment dates
- Students who are active, enrolled and have not graduated have a blank graduation date
- Students with classes have valid Scheduling Transaction Effective Dates
- Students with classes have acceptable Scheduling Transaction Drop and Add Records

To run the Year Start Student Validation Report:

- Go to Student Management\Office\YE\YU\RE\YS.

Running the Students Processed in Year End Report

This report lists students who were processed during Year End. The report shows the student's Name, Graduation Year, Other ID, Birthday, and Default Entity.

To run the Students Processed in Year End Report:

- Go to Student Management\Office\YE\YU\RE\SP.

Appendix A - Recommendations for Gradebook Records Retention

This appendix contains information about records retention as it pertains to Gradebook Records.

Retention Timelines

According to the *School Districts and Educational Service Districts Records Retention Schedule*, Disposition Authority Numbers SD51-06E-01 and SD51-06E-02, you must retain Gradebook documentation for:

- A minimum of *1 year* for an elementary school
- A minimum of *5 years* for a secondary school

Retention Format

RCW 40.14.010 defines Public Records as "...any paper, correspondence, completed form, bound record book, photograph, film, sound recording, map drawing, machine-readable material, compact disc meeting current industry ISO specifications, or other document, regardless of physical form or characteristics, and including such copies thereof, that have been made by or received by any agency of the state of Washington in connection with the transaction of public business, and legislative records described in RCW 40.14.100."

Since RCW Chapter 40.14 makes no distinction between *paper records* and *electronic records*, both formats are acceptable for retention purposes. For all reports recommended in this document, school districts may elect to print them and store them, or save them to computer media (for example, DVD, storage cards, etc.) and store them.

Retaining Records from a Secondary Gradebook

According to the State Auditor's Office, you must retain all data in a Gradebook. Because the Secondary Progress Report By Entity Report can include all data from all Secondary Gradebooks in an Entity, this report is recommended for retaining Secondary Gradebook Records.

Creating the Secondary Progress Report by Entity Template

When you run this report, the Grading Period you select in the Display Grades and Assignments for Term box should correspond with the Grading Period(s) in which students earn credit for the class (such as Semester 1). If an Entity has Course Length Sets that include more than one credit-earning Grading Period (such Year Long Courses), run this report once for each credit-earning (Semester) Grading Period.

To run the Secondary Progress Report by Entity Report:

1. Go to Educator Access Plus\Administrator Access\Secondary Progress Report By Entity.
2. Click Add.
3. In the Grades and Students to Print area, select the Print Dropped Students option.

Note Do not select the following options (because selecting these options narrows down what prints on the report):

- Only print students with a grade mark of
 - Only print students with XXXX percent
 - Only print students with XXXX absences
-

4. In the Report Ranges area, keep all ranges wide open and select Both in the Status box.
5. In the Report Format area, select the following options:
 - Display Student's Name
 - Display Student ID
 - Display Grades for Previous Terms
 - Display Teacher's Log
 - Assignment Comments
 - Assignment Detailed Description
 - Missing Indicator and Reason
 - Earned and Possible Points
 - Percent Earned
 - Grade Mark
 - Special Codes
 - Special Codes Legend

Note Do not select the following options (because selecting these options narrows down what prints on the report):

- Do Not Print Assignments Marked as ‘No Count’
 - Do Not Print Ungraded (*) Assignments
 - Do Not Print Assignments Not Posted to Family Access
 - Only Print Courses that are Graded
-

After you run the report, print it or save it electronically. Alternatively, each teacher can generate a Progress Detail Report from their Secondary Gradebook for each student in each of their classes using the same instructions.

Retaining Records from a Standards Gradebook

According to the State Auditor’s Office, you must retain all data in a Gradebook. Unlike Secondary Gradebook, there is no Progress Report that you can generate administratively for all Standards Gradebooks in an Entity. Each teacher who uses Standards Gradebook must generate Progress Detail Reports from within their Standards Gradebook in each of their classes using the following instructions.

Creating the Progress Detail Report Template

In a high school, the Grading Period you select in the Show Student Grades for Term box should correspond with the Grading Period in which a student earned credit for the class (for example, Semester 1). If an Entity has Course Length Sets that include more than one credit-earning Grading Periods (for example, Year Long courses), run this report once for each credit-earning (semester) Grading Period.

In an elementary or middle school, you must run this report once for each term.

As teachers are required to print and save their Gradebooks for *each* class, select **Only Print this Class** in the Classes to Print for Selected Students area. Run the report for each separate Standards Gradebook.

To run the Progress Detail Report:

1. Go to Educator Access Plus\Teacher Access\My Gradebook\Standards Gradebook\Reports\Gradebook\Progress Detail Report.
2. In the Event Fields to Print area, select the following options:
 - Event Comment
 - Event Detailed Description
 - Missing Indicator and Reason

- Earned and Possible Points
- Percent Earned
- Grade Mark
- Special Codes

Note Do not select the following options in the Event Detail area (because selecting these options narrows down what prints on the report):

- Do Not Print Events Marked as ‘No Count’
 - Do Not Print Ungraded (*) Events
-

3. After you save your template, select it and click Select Different Students.
4. Select all your students, including students who have dropped the class, and click Print.
5. When the report appears, print it or save it electronically.

Retention Methods to Avoid

Some forms of Gradebook retention methods are not recommended. These include:

- Gradebook Backups
- Prior Year Gradebooks

Gradebook Backups

Gradebook Backups (Student Management\Educator Access Plus\GB Setup\CF\GB) are not a “snapshot” as printed or saved reports are. Gradebook Backups are affected by such actions as student drops, deletions, and Course Master changes. For example, if a Course is deleted, all Gradebook Backups associated with the Course are also deleted, which prevents Gradebook Backups from being a reliable form of records retention.

Prior Year Gradebooks

Teachers and staff can access all Prior Year Gradebooks, but these are also not a reliable form of records retention for reasons similar to Gradebook Backups. Prior Year Gradebooks are also affected by deletions and changes in the database. For example, if a teacher is deleted, all Prior Year Gradebooks associated with that teacher are also deleted.

Information on Retention of Other Records

To learn more about the retention of non-Gradebook Records, such as Attendance, Health, Special Education, Finance, etc., see the Washington State Archives *School Districts and Educational Service Districts Records Retention Schedule* at the following URL:

<http://www.sos.wa.gov/archives/RecordsManagement/Records-Retention-Schedules-for-School-Districts-and-Educational-Service-Districts.aspx>

Gradebook Purge Schedule

Based on the recommended retention for Gradebook documentation, Table 5 shows a schedule for purging Gradebooks.

Date	Purge Gradebooks from School Year	
	Elementary Schools	Secondary Schools
August 2024	2022-23	2018-19
August 2025	2023-24	2019-20
August 2026	2024-25	2020-21
August 2027	2025-26	2021-22
August 2028	2026-27	2022-23
August 2029	2027-28	2023-24
August 2030	2028-29	2024-25
August 2031	2029-30	2025-26
August 2032	2030-31	2026-27
August 2033	2031-32	2027-28
August 2034	2032-33	2028-29

Table 5 - Gradebook Purge Schedule

Appendix B - Managing Entry-Withdrawal Records

This appendix will help you understand how to handle Entry/Withdrawal Records for shared students. Review the following scenarios to help you avoid CEDARS errors and prepare for the Student Year End Process.

Entry-Withdrawal Student Scenarios

SCENARIO 1: District Withdrawal Codes & State Type Codes attached

Code	Short Description	Long Description	Status*	Start Year	Stop Year	Type	State Type
PRO	PROMOTED	PROMOTED	Active	2003	9999		T1
RET	RETAINED	RETAINED	Active	2003	9999		
SC	STATUS CHANGE	STATUS CHANGE	Active	2003	9999		
SCD	STAT CHG DEF	STAT CHG DEF	Active	2003	9999		T1

SCENARIO 2: Student's Skyward Entry/Withdrawal Records

Entity	Entry	Code	School	Dflt Ent	Withdrawal	Code	Most Recent District Entry Date	School Year	%Enrolled	Advanced	Retained
201	09/02/2015	ENT	201				09/02/2009		100	N	N
201	09/17/2014	ENT	201	N	06/13/2015	SCD	09/02/2009	2016	6	N	N
103	09/17/2014	ENT	103	Y	06/13/2015	PRO	09/02/2009	2016	94	N	N
103	09/06/2012	ENT	103	Y	09/16/2014	SC	09/02/2009	2015	100	N	N
103	09/02/2009	ENT	103	Y	06/18/2011	PRO	09/02/2009	2011	100	N	N

SCENARIO 3: Student's CEDARS extract File C Enrollment Records

	A	B	C	D	E	F	G
1	School Year	Location	SchoolEnrolmentDate	SchoolEntryCode	SchoolExitDate	SchoolWithdrawalCode	IsPrimarySchool
2	2016	201	9/2/2015	ENT			Y
3	2016	201	9/17/2014	ENT	6/13/2015	T1	N
4	2016	103	9/6/2012	ENT	6/13/2015	T1	Y

CEDARS Data Element C10

Question: Where does the value of Data Element C10 come from in Skyward’s School Management System? Per the CEDARS Data Manual, Data Element C10 = “Is this the School that is Primarily Responsible for the Student?”

	A	B	C	D	E	F	G
1	School Year	Location	SchoolEnrollmentDate	SchoolEntryCode	SchoolExitDate	SchoolWithdrawalCode	IsPrimarySchool
2	2016	201	9/2/2015	ENT			Y
3	2016	201	9/17/2014	ENT	6/13/2015	T1	N
4	2016	103	9/6/2012	ENT	6/13/2015	T1	Y

Answer:

The WSIPC CEDARS logic looks at specific fields in a specific order to determine what is reported in the Enrollment Record for C10.

Note Enrollment must include at least 1 day of the CEDARS Reporting school year.

Determining Primary School

If the student is currently enrolled, then the WA Primary School box is used to determine Primary School (element C10). If the WA Primary School box is equal to No, then element C10 is reported as “N.” If the WA Primary School box is blank, the value in the Default Entity box on the Entity tab is used to determine whether an Entity is the primary school.

If the student is withdrawn, the value in the Default Entity box on the Entry/Withdrawal tab is used to determine whether an Entity is the primary school (Figure 6).

Note Typically, the WA Primary School box is left blank to allow WSIPC CEDARS logic to determine the Primary School. However, this box can be used as a manual override to indicate which school district is the Primary School in cases where students are shared between *districts*.

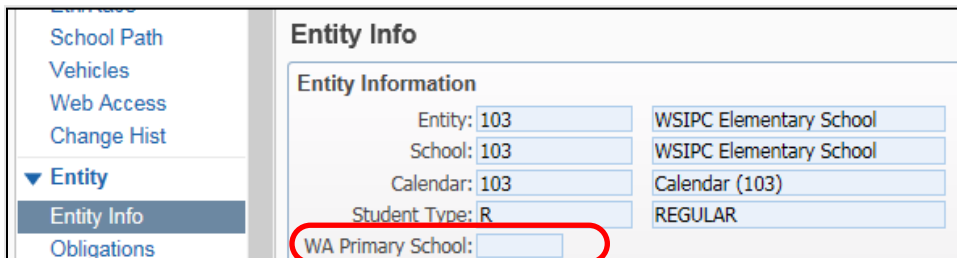


Figure 6 - WA Primary School box

Example #1

If there is an Entry Record that *has no Withdrawal*, then the WA Primary School box is used to determine Primary School.

- If the WA Primary School box is equal to Yes, then element C10 (Primary School) = "Y."
- If WA Primary School box is equal to No, then element C10 = "N."
- If the WA Primary School box is blank, the value in the Default Entity box on the Entity tab is used to determine whether an Entity is the primary school.
 - If the current Default Entity is the same as the Entity on the Skyward Entry Record, "Yes" is reported for the CEDARS Record.
 - If the current Default Entity is not the same as the Entity on the Skyward Entry Record, "No" is reported for the CEDARS Record.

Grad Year (Grade): 2022 (06) DOB (Age): 10/28/2003 (12) Entity, School, Status: 201, 201, A **Default: 201, 201, A**

Advisor: Lambornscr, Dino H Gender: M NY Status: A Other ID: 525519 Phone: (555)992-5564

Entry/Withdrawal

Views: General Filters: E/W

Entity	Entry	Code	School	Dflt Ent	Withdrawal	Code	Most Recent District Entry Date	School Year	%Enrolled	Advanc
201	09/02/2015	ENT	201				09/02/2009		100	N
201	09/17/2014	ENT	201	N	06/13/2015	SCD	09/02/2009	2016	6	N
103	09/17/2014	ENT	103	Y	06/13/2015	PRO	09/02/2009	2016	94	N
103	09/06/2012	ENT	103	Y	09/16/2014	SC	09/02/2009	2015	100	N
103	09/02/2009	ENT	103	Y	06/18/2011	PRO	09/02/2009	2011	100	N

Skyward Entry/Withdrawal Record #1 has no Withdrawal and the Default Entity 202 matches the Entity of the record. "Yes" is reported in the CEDARS extract for Record #1.

	A	B	C	D	E	F	G
1	School Year	Location	SchoolEnrollmentDate	SchoolEntryCode	SchoolExitDate	SchoolWithdrawalCode	IsPrimarySchool
2	2016	201	9/2/2015	ENT			Y
3	2016	201	9/17/2014	ENT	6/13/2015	T1	N
4	2016	103	9/6/2012	ENT	6/13/2015	T1	Y

Example #2

If there is an Entry Record that *does have a Withdrawal* with an attached State Type Withdrawal Code, the value from the Default Entity at the time of Withdrawal box on the record is used to determine Primary School.

Grad Year (Grade): 2022 (06) DOB (Age): 10/28/2003 (12) Entity, School, Status: 201, 201, A Default: 201, 201, A

Customize

Advisor: Lambornscr, Dino H Gender: M NY Status: A Other ID: 525519 Phone: (555)992-5564

Entry/Withdrawal

Views: General Filters: E/W

Entity	Entry	Code	School	Dflt Ent	Withdrawal	Code	Most Recent District Entry Date	School Year	%Enrolled	Advanc
201	09/02/2015	ENT	201				09/02/2009		100	N
201	09/17/2014	ENT	201	N	06/13/2015	SCD	09/02/2009	2016	6	N
103	09/17/2014	ENT	103	Y	06/13/2015	PRO	09/02/2009	2016	94	N
103	09/06/2012	ENT	103	Y	09/16/2014	SC	09/02/2009	2015	100	N
103	09/02/2009	ENT	103	Y	06/18/2011	PRO	09/02/2009	2011	100	N

Skyward Entry/Withdrawal Record #2 has Withdrawal with a State Type of T1, so the value (N) from the Dflt Ent box (Default Entity at the time of withdrawal) is reported in the CEDARS extract for Record #2.

	A	B	C	D	E	F	G
1	School Year	Location	SchoolEnrollmentDate	SchoolEntryCode	SchoolExitDate	SchoolWithdrawalCode	IsPrimarySchool
2	2016	201	9/2/2015	ENT			Y
3	2016	201	9/17/2014	ENT	6/13/2015	T1	N
4	2016	103	9/6/2012	ENT	6/13/2015	T1	Y

Skyward CEDARS Concatenation Logic

Question: When are Entry/Withdrawal Records concatenated to create an Enrollment Record in CEDARS extract File C?

Answer:

Student EW Records are concatenated creating just one School Student File Entry Record in File C when all of the following apply:

- The student exited and re-entered the next day in the same Entity
- The Withdrawal Code State Type is blank
- Primary School the records are both "Yes" or both "No"

Example

Skyward Entry/Withdrawal Records #3 & #4-concatenated to report CEDARS Enrollment Record #3.

WESPaC E/W:

Both Default Entity values are Y

Entity	Entry	Code	School	Dflt Ent	Withdrawal	Code
103	09/17/2014	ENT	103	Y	06/13/2015	PRO
103	09/06/2012	ENT	103	Y	09/16/2014	SC

Same
Entity

No gap in
dates

No State Type
attached

CEDARS Extract:

	A	B	C	D	E	F	G
1	School Year	Location	SchoolEnrollmentDate	SchoolEntryCode	SchoolExitDate	SchoolWithdrawalCode	IsPrimarySchool
2	2016	201	9/2/2015	ENT			Y
3	2016	201	9/17/2014	ENT	6/13/2015	T1	N
4	2016	103	9/6/2012	ENT	6/13/2015	T1	Y

Managing Shared Students

Question: If there is a shared student who is enrolled in two Entities at the end of the school year who will be rolling up to the Non-Default Entity, what should the Entry/Withdrawal Records look like? (The student's Default Entity will be changing.)

Answer:

Withdrawal dates at both Entities should match:

- The State Type Code for the Withdrawal for the current Default Entity should be T1, and the Dflt Entity at the time of withdrawal should be Y.
- The State Type Code for the Withdrawal for the current Non-Default Entity should be T1, and the Dflt Entity at the time of withdrawal should be N.
- Create a Re-enrollment Record in the current Non-Default Entity (which will become the new Default Entity). The Entry Date can be the date directly after the Withdrawal Date, or the first day of the next School Year (this is the district's choice.)

Student's Entry/Withdrawal Records:

Entry/Withdrawal											
Views: General		Filters: E/W									
Entity	Entry	Code	School	Dflt Ent	Withdrawal	Code	Most Recent District Entry Date	School Year	%Enrolled	Advanced	Retained
201	09/02/2015	ENT	201				09/02/2009		100	N	N
201	09/17/2014	ENT	201	N	06/13/2015	SCD	09/02/2009	2016	6	N	N
103	09/17/2014	ENT	103	Y	06/13/2015	PRO	09/02/2009	2016	94	N	N
103	09/06/2012	ENT	103	Y	09/16/2014	SC	09/02/2009	2015	100	N	N
103	09/02/2009	ENT	103	Y	06/18/2011	PRO	09/02/2009	2011	100	N	N

CEDARS extract File C:

	A	B	C	D	E	F	G
1	School Year	Location	SchoolEnrollmentDate	SchoolEntryCode	SchoolExitDate	SchoolWithdrawalCode	IsPrimarySchool
2	2016	201	9/2/2015	ENT			Y
3	2016	201	9/17/2014	ENT	6/13/2015	T1	N
4	2016	103	9/6/2012	ENT	6/13/2015	T1	Y

Example

At the end of the school year the student is dual enrolled at Entity 104 (Default Entity) and 202 (Non-Default Entity).

At the beginning of the next school year the student will not be attending Entity 104, and Entity 202 will become the Default Entity.

- The Withdrawal Records for both Entities have the same withdrawal date, and both have a State Type of T1 attached.
- The Withdrawal Record for Entity 104 has Y for Default Entity at the time of withdrawal, and the record for Entity 202 has No for Default Entity at the time of withdrawal.
- The new Entry Record for Entity 202 is the first day of the next school year (but could be the day after the withdrawal). There is no withdrawal date, and since 202 is the new Default Entity, Is Primary School is reported as Y (Yes) for the next school year.

Shared Students Exiting the District at the End of the Year

Question: When a student is enrolled in two Entities at the end of the year and is leaving the district, do the withdrawal dates need to be the same or different? What State Type Withdrawal Codes should be used?

Answer:

The Non-Default Entity should use a Withdrawal Code that has a State Type of T1, and the Default Entity should use a Withdrawal Code that has a State Type of T0. The withdrawal dates can be the same, or the Non-Default Entity can use a date that is at least one day prior to the withdrawal date that was used by the Default Entity.

Advanced/Retained Students

Question: When a student is advanced or retained, what logic is used to concatenate the Entry/Withdrawal Records?

Answer:

- The Entry/Withdrawal Records are concatenated when:
 - Both records are for the same Entity, *and*
 - The Withdrawal Code has no State Type Code attached, *and*
 - The Withdrawal Record has the Retained or Advanced box set to Y (Yes).

Entry/Withdrawal												
Views: General		Filters: E/W										
Entity	Entry	Code	School	Dflt Ent	Withdrawal	Code	Most Recent District Entry Date	School Year	%Enrolled	Advanced	Retained	
103	09/02/2015	ENT	103				09/02/2015		100	N	N	
103	01/20/2014	ENT	103	Y	06/15/2015	RET	09/02/2015	2016	100	N	Y	

Note Entry and Withdrawal dates are not used in the CEDARS concatenation logic for Advanced/Retained Records. This logic applies all year.

Appendix C - Preparing My Data for Student Year End Checklist

This appendix contains a checklist that building staff can use to help ensure that all of their Entity tasks have been completed. Building staff can indicate who completed each task and turn it in to the district staff responsible for running the Student Year End Wizard. The completed checklist assists district personnel in verifying that the Entity data is ready for Student Year End Processing. You can separate it from this Guide, copy it, and distribute it to building staff.

Entity Checklist – Preparing Data before Running the Student Year End Wizard

All Entities must perform Student Year End Processing to ensure that data is correctly retained in the current school year and is correctly rolled to the next school year. All Entities must perform some tasks while other tasks, such as GPA Calculation, need to be performed only at middle or high schools. This checklist assists you in preparing your data for Student Year End.

Done By	Student Year End Task	Elem	Sec
	<p>Student Demographics:</p> <ul style="list-style-type: none"> ▪ Update information such as address changes etc. (X X) ▪ Pre-registered students at their current grade level (X X) ▪ Mass Add Students to an Entity (X X) (Student Management\Students Setup\UT\MA) ▪ Mark students as academically Advanced and/or Retained (X X) (Student Management\Students\ST\PR\General Profile) ▪ Withdraw students for whom you have received notification of withdrawal (X X) ▪ Run the Retention and Promotion Report (X X) (Student Management\Office\YE\YU\RE\RP) ▪ Create the Graduation Date for outgoing Senior class (X X) (Student Management\Students Setup\UT\GD) ▪ Review Entry/Withdraw Codes (X X) (Student Management\Students Setup\CO\EN) (Student Management\Students Setup\CO\WC) ▪ Inactivate Students Not Enrolled (X X) ▪ Run Student Enrollment Reports (X X) ▪ Recalculate Entity Counts (X X) (Student Management\Advanced Features\EC Setup\UT\RS) ▪ Retain Military Family Information (X X) 		
	<p>Attendance:</p> <ul style="list-style-type: none"> ▪ Enter and update Attendance Records (X X) ▪ Truancy Programs and Petitions (X X) (Student Management\Federal/State Reporting\WA\RE\SR\AR\AT) ▪ Monthly Quarterly Report (X X) (Student Management\Office\AT\RE\AR\MQ) ▪ Update Attendance History YTD Totals Utility (X X) (Student Management\Office\Attendance Setup\UT\UY) (Student Management\Office\YE\YU\UY) 		

Done By	Student Year End Task	Elem	Sec
	Grading: <ul style="list-style-type: none"> ▪ Honor Roll (Student Management\Office\GR\RE\SL\HR) ▪ Report Cards <ul style="list-style-type: none"> ▫ District or Custom Report Cards (Student Management\Office\GR\RC\RE\DR or CD) ▫ Standards Based Report Cards (Student Management\Office\GR\RC\SB\BR or CR) ▪ Update Student GPA <ul style="list-style-type: none"> ▫ Run a Mass Audit (Student Management\Office\Grading Setup\UT\ GP\MA) ▫ Run GPA Calc (Student Management\Office\Grading Setup\UT\ GP\GC) ▪ Student Rank Report (Student Management\Office\Grading\RE\SL\SR) ▪ Transcript Labels (Student Management\Office\Grading\Transcripts\RE\TL) 	X X X X X X X X X X	X X X X X X X X X X
	Textbooks: <ul style="list-style-type: none"> ▪ Run the Textbook Assignment Audit Utility (Student Management\Administration\TE Setup\UT\TA) 	X	X
	Student Obligations: <ul style="list-style-type: none"> ▪ Clone obligations to next year (Student Management\Administration\OB Setup\UT\YE\CS) 	X	X
	Scheduling: <ul style="list-style-type: none"> ▪ Verify that the tables for next year are created (Student Management\Office\Future Scheduling Setup\UT\SC) ▪ Verify that an Actual Schedule Generation is run (Student Management\Office\Future Scheduling\SS\AS\RA) 	X X	X X
	Activities: <ul style="list-style-type: none"> ▪ Clone Activities (Student Management\Students\PR\Activities) 	X	X

Done By	Student Year End Task	Elem	Sec
	Modules that have Student Year End Processes, that the district personnel responsible for those modules perform: <ul style="list-style-type: none"> ▪ Fee Management ▪ Food Service ▪ Gradebook ▪ Special Education 	X X X X	X X X X

Appendix D - Student Year End Processing Checklist

This appendix contains a checklist that you can use to help ensure that all of your Entities process correctly. Fill out the checklist with each Entity's information, and then check the Entities off the list as you process them. This appendix also includes a sample to show you how to complete the checklist.

SAMPLE

STUDENT YEAR END PROCESSING BY ENTITY

Complete	Entity Name	Entity #	Entity Grade Levels	Save GPA / Credit Totals	Retained Students Withdraw	Retained Students Entry	Advanced Students Withdraw	Advanced Students Entry	Outgoing Class Grade/ Grad Yr	Outgoing Class Withdraw	**K - GLO Withdraw Remaining	Year Start
												**K - GLO Mass Entry
<input checked="" type="checkbox"/>	WSIPC Elementary 1	101	K - 5	N	6/18/2024 RET	9/9/2024 RET	6/18/2024 ADV	9/9/2024 ADV	5th (2031)	6/18/2024 PRO/T1	6/18/2024 KIN	6/19/2024 KIN
<input checked="" type="checkbox"/>	WSIPC Elementary 2	103	K - 5	N	6/18/2024 RET	9/9/2024 RET	6/18/2024 ADV	9/9/2024 ADV	5th (2031)	6/18/2024 PRO/T1	N/A	N/A
<input type="checkbox"/>	WSIPC Elementary 3	105	K - 5	N	6/18/2024 RET	9/9/2024 RET	6/18/2024 ADV	9/9/2024 ADV	5th (2031)	6/18/2024 PRO/T1	N/A	N/A
<input type="checkbox"/>	WSIPC Middle School	320	6 - 8	Y	6/18/2024 RET	9/9/2024 RET	6/18/2024 ADV	9/9/2024 ADV	8th (2028)	6/18/2024 PRO/T1	N/A	N/A
<input type="checkbox"/>	WSIPC High School	401	9 - 12	Y	6/18/2024 RET	9/9/2024 RET	6/18/2024 ADV	9/9/2024 ADV	12th (2024)	6/14/2024 G0/G0	N/A	N/A
<input type="checkbox"/>	Out of District	999	None	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
<input type="checkbox"/>	WSIPC School District	000	None	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

** Optional – For Entities that offer K2 (Part-Day Kindergarten programs)

STUDENT YEAR END PROCESSING BY ENTITY

Complete	Entity Name	Entity #	Entity Grade Levels	Save	Retained	Retained	Advanced	Advanced	Outgoing	Outgoing	**K - GLO Withdraw	**K - GLO Entry
				GPA / Credit Totals	Students Withdraw	Students Entry	Students Withdraw	Students Entry	Class Grade/ Grad Yr	Class Withdraw		
<input type="checkbox"/>												
<input type="checkbox"/>												
<input type="checkbox"/>												
<input type="checkbox"/>												
<input type="checkbox"/>												
<input type="checkbox"/>												
<input type="checkbox"/>												
<input type="checkbox"/>												
<input type="checkbox"/>												
<input type="checkbox"/>												
<input type="checkbox"/>												
<input type="checkbox"/>												
<input type="checkbox"/>												
<input type="checkbox"/>												

** Optional – For Entities that offer K2 (Part-Day Kindergarten programs)

Appendix E - Preparing My Data for Student Year Start Checklist

This appendix contains the Student Year Start checklist. This checklist assists building staff in preparing their data for the start of the next school year. You can separate it from this Guide, copy it, and distribute it to building staff.

Entity Checklist – Preparing Data after the Year End Wizard for the Start of School

After the Student Year End Process is completed, all Entities must perform some tasks to prepare for the start of the next school year while other tasks, such as GPA Calculation, need to be performed only at middle or high schools. This checklist assists you in preparing your data for the start of the next school year.

Done By	Student Year Start Task	Elem	Sec
	Food Service: <ul style="list-style-type: none"> ▪ Run the Food Service Price Category Audit (Student Management\Food Service\FS Setup\UT\AU\PC) 	X	X
	Attendance: <ul style="list-style-type: none"> ▪ Review the Calendar Master (Student Management\Office\AT Setup\CO\CC) ▪ Use Percent Enrolled in Absence Calculation (Product Setup\Skyward Contact Access\DS\CF\ST) ▪ Update Attendance Report templates <ul style="list-style-type: none"> ▫ Day Summary Report (Student Management\Office\AT\RE\AR\DS) ▫ Monthly Quarterly Report (Student Management\Office\AT\RE\AR\MQ) ▫ Attendance Detail or Summary Report (Student Management\Office\AT\RE\AR\AD) ▪ Clone Attendance Letters Setup (Student Management\Office\AT\AL Setup\UT\CA) 	X	X

Done By	Student Year Start Task	Elem	Sec
	<p>Inactive Entity:</p> <ul style="list-style-type: none"> ▪ Complete Start of Year Actions for Inactive Entities <ul style="list-style-type: none"> ▫ Verify Entity Year Exists (Student Management\Office\CS Setup\CF\SE) ▪ Create Entity Year for next school year if it doesn't exist (Student Management\Office\FS Setup\UT\CE) ▪ Exclude the Entity from State Reporting (Student Management Setup\CF\EY\Current School Year\Entity Year Options) 	X X X	X X X
	<p>Student Demographics:</p> <ul style="list-style-type: none"> ▪ Update Student Current Year Member flag (Student Management\Students\ST Setup\UT\MM) ▪ Mass Change LEP for continuing students. (Student Management\Students\ST Setup\UT\NU\MC) ▪ Running the Mass End and Mass End Special Programs Utility to Maintain LAP and Washington Reading Corps Literacy Support program records ▪ Mass Delete Student Categories from Students (Student Management\Office\Year End\YU\FS) ▪ Mass Delete Student Category Codes (Student Management\Office\YE\YU\CC) ▪ Separate Graduated Students from Families (optional) (Student Management\Office\YE\YU\SG) ▪ Update report templates that contain School Year or Grade/Graduation Year parameters ▪ Update Calendars for Elementary Entities ▪ Blank Elementary GLO (K2) (Student Management\Students Setup\UT\MC) ▪ Advisor and/or Homeroom updates (three steps) (Student Management\Students\ST Setup\UT\MC) (Student Management\Students\ST Setup\UT\SA) (Student Management\Students\ST Setup\UT\SH) ▪ Mass Clear AUP (Acceptable Use Policy) (Student Management\Students\ST Setup\AU) 	X X X X X X X X X X X X X	X X X X X X X X X X X X

Done By	Student Year Start Task	Elem	Sec
	<p>Current Scheduling:</p> <ul style="list-style-type: none"> ▪ Mass Create Initial Add Scheduling Transactions (Student Management\Office\CS\SS Setup\UT\AT) ▪ Historical Class History Grad Year Correction (Student Management\Office\YE\YU\Historical Class History Grad Year Correction) 	<p>X X</p>	<p>X X</p>
	<p>Grading:</p> <ul style="list-style-type: none"> ▪ Review Grading Setup (Student Management\Office\GR Setup\CF\GS) ▪ Enable View of Grade Change Information (Product Setup\Skyward Contact Access\DS\CF\ST) 	<p>X X</p>	<p>X X</p>
	<p>Discipline:</p> <ul style="list-style-type: none"> ▪ Configure Suspension/Expulsion to Attendance options (Student Management\Office\DI Setup\CF\SE) 	<p>X</p>	<p>X</p>
	<p>Health:</p> <ul style="list-style-type: none"> ▪ Verify that the Age Effective Date in Vaccination Configuration is set to Use Today's Date. (Student Management\Office\HR\VA Setup\CF\VA) 	<p>X</p>	<p>X</p>
	<p>Year Start Validation Reports:</p> <ul style="list-style-type: none"> ▪ Year Start Course Validation Report - Validate Course, Section and Calendar information. (Student Management\Office\YE\YU\RE\YC) ▪ Year Start Student Validation Report – List of students that were withdrawn during Year End. (Student Management\Office\YE\YU\RE\YS) ▪ Students Processed in Year End Report – List of students that were withdrawn during Year End (Student Management\Office\YE\YU\RE\SP) 	<p>X X X</p>	<p>X X X</p>

Done By	Student Year Start Task	Elem	Sec
	Modules that have Student Year Start Processes, that the district personnel responsible for those modules perform: <ul style="list-style-type: none"> ▪ Fee Management ▪ Food Service ▪ Gradebook ▪ Special Education 	X X X X	X X X X

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