

PowerSchool End of Year Process Checklist - Summer 2016

Pre-End of Year Preparation

Items 1 through 16 are tasks that do not have to be completed in a specific order. Items are marked with whether the task needs to be performed at the School Level or at the District Office. Since this is a combined document, items marked PS-EOY affect the rollover of students and data in the PowerSchool, and items marked EMIS affect Ohio State Reporting.

☐ 1. PS-EOY *School Level*** Verify PowerSchool Sched_NextYearGrade is accurate for all students.**

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

To verify that all students have a Sched_NextYearGrade set

1. Search for students where the **Sched_NextYearGrade** is blank. (Sched_nextyeargrade=)
2. For any students who are returned by the search, make changes on the student's "Scheduling Setup" page or by mass updating per guidelines below.

NOTE: For students that will be retained and preregistered, modify this field individually or in groups after mass changes are made. The Sched_NextYearGrade field will need to be completed for retained students. It should not be incremented to the next grade level, but should be set to the current grade level.

K-12 Schools

- **Grade_Level PK -11 Students:** Pick grade levels one at a time and use the group function "Student Field Value" to change each **Sched_NextYearGrade** field to the appropriate next year grade level (Use -1 for PK and 0 for Kindergarten).
- **Grade_Level 13 & 14 Students:** Data for these students should be handled on an individual basis and should be completed on the Scheduling Setup screen with the help of guidance staff.
- **Graduating HS Seniors:** Sched_NextYearGrade field should be set to **99**.

Community Schools

- Follow the above directions for all of your lower grade_level students.
- If your school does not have any graduating seniors, students in your highest grade level should be set to grade level 99.
- For schools using Sub-District Configuration, students who have "graded out" of lower level buildings and are transitioning between buildings will be handled by the EOY Process and the same process should be followed as for K-12 Schools.

ESC's

- Any Preschool students who are advancing to KG and therefore, leaving the ESC should be set to grade level 99.

☐ 2. EMIS *School Level*** Verify Ohio State Reporting Grade Level Next Year is accurate for all students.**

This can be done individually on the State/Province – OH > FN Tab, or processed in groups by updating the S_OH_STU_FN_X.Next_Year_Grade field using the Student Field Value group function.

PowerSchool End of Year Process Checklist - Summer 2016

To verify that all students have a *S_OH_STU_FN_X.Next_Year_Grade* set

1. Search for students where the *S_OH_STU_FN_X.Next_Year_Grade* is blank. (*S_OH_STU_FN_X.Next_Year_Grade* =)
2. For any students who are returned by the search, make changes on the student's "State/Province – OH > FN Tab" or by mass updating per guidelines below.

NOTE: For students that will be retained and preregistered, modify this field individually or in groups after mass changes are made. The *S_OH_STU_FN_X.Next_Year_Grade* field will need to be completed for retained students. It should not be incremented to the next grade level, but should be set to the current grade level.

K-12 Schools

- **PowerSchool Grade_Level PK -11 Students:** Pick grade levels one at a time and use the group function "Student Field Value" to change each *S_OH_STU_FN_X.Next_Year_Grade* field to the appropriate next year grade level (Use PS for Preschool, KG for Kindergarten and the two-digit grade level for grades 01 through 11).
- **PowerSchool Grade_level 13 & 14 Students:** Data for these students should be handled on an individual basis and should be completed on the State/Province – OH > FN Tab with the help of guidance staff.
- **Graduating HS Seniors:** *S_OH_STU_FN_X.Next_Year_Grade* field should be set to **GR**.

Community Schools

- Follow the above directions for all of your lower grade_level students.

ESC's

- Any Preschool students who are advancing to KG and therefore, leaving the ESC should be set to grade level KG or as appropriate.

3. PS-EOY *School Level*** Transfer Out Graduates and Students Grading Out of Your PowerSchool Server**

This can be done individually, or processed in groups by using the Transfer Out Of School group function.

Ohio Graduates

- Select all Ohio HS Graduates. Select the **Transfer Out of School** group function. Set the **Transfer Comment** to Graduated. Set the **Date of Transfer** to the day after the Diploma Date or, if desired, the day after the last day of school. Set the **Exit Code** to **99**. Set the **Auto-Transfer School Options** to **Keep in the current school**. (NOTE: The PowerSchool EOY Process will appropriately transfer students to the Graduated Building and properly code them in the backend. **DO NOT CHOOSE TO Transfer to Graduated Students building.**)

Community Schools – RUN THIS ONLY FOR THE SCHOOLS THAT SERVE YOUR HIGHEST GRADE LEVEL

- Select all students in the highest grade level of your server who are not being retained. Select the **Transfer Out of School** group function. Set the **Transfer Comment** to Graduated (or other desired Comment). Set the **Date of Transfer** to the day after the last day of school. Set the **Exit Code** to 41. Set the **Auto-Transfer School Options** to **Keep in the current school**. (NOTE: The PowerSchool EOY Process will appropriately transfer students to the Graduated Building and properly code them in the backend. **DO NOT CHOOSE TO Transfer to Graduated Students building.**)

PowerSchool End of Year Process Checklist - Summer 2016

ESC's

- Select all students transitioning out of Preschool. Select the **Transfer Out of School** group function. Set the **Transfer Comment** to Transitioning to KG (or desired comment). Set the **Date of Transfer** to the day after the last day of school. Set the **Exit Code** to 36. Set the **Auto-Transfer School Options** to **Keep in the current school**. (NOTE: The PowerSchool EOY Process will appropriately transfer students to the Graduated Building and properly code them in the backend. **DO NOT CHOOSE TO Transfer to Graduated Students building.**)

□ 4. PS-EOY ***School Level*** Verify Next_school is accurate for each student.

This can be done individually on the Scheduling Setup student screen, or processed in groups by updating the Next_School field using the Group Function.

Select all the students in the building except for the highest grade using **/grade_level<highest grade in the building** and use the group function "Next School Indicator" to choose the school for next year. This will typically be the same school in which they are enrolled. Exceptions are handled on an individual basis on the students' Schedule Setup screen.

Select all students in the highest grade level in the building by using **/grade_level=highest grade level in the building** and use the group function "Next School Indicator" to choose the school to which those students are transitioning.

For Graduated Seniors: Select the **/grade_level=12;enroll_status=2;exitdate=MM/DD/YYYY** (the date used when these students were transferred out as graduated). If students have not yet been transferred out, simply select your graduates. Students lower than 12th grade who are graduating will need to be manually updated as well. Use the group function "Next School Indicator" and select the Graduated Students school.

For Grade_Level 13 (or 14) students: Select the **/grade_level=13 (or 14)** and use the group function "Next School Indicator" to choose the next school. This will typically be the same school in which they are enrolled. Exceptions are handled on an individual basis on the students' Schedule Setup screen.

Community Schools: If your school does not have any graduating seniors, set the Next School Indicator for students in your highest grade level to Graduated Students building. Use the group function "Next School Indicator" and select the Graduated Students school.

ESCs: Select the students who are transitioning out of Preschool, and set the Next School Indicator to Graduated Students building. You may manually update on the Schedule Setup screen or use the group function "Next School Indicator" and select the Graduated Students school.

NOTE 1: If you do not see the next school in the dropdown list or you see multiples, contact CONNECT Student Department for assistance in rectifying this issue.

NOTE 2: For students that will be retained, modify this field individually or in groups after the mass changes have been made. The Sched_NextSchool field will need to be completed for retained students, and will typically be the same school in which they are currently enrolled.

□ 5. PS-EOY ***District and School Levels*** Verify Years & Terms are 100% accurate for all buildings in your district.

At District Level - District > Years & Terms

At School Levels - School > Years & Terms

PowerSchool End of Year Process Checklist - Summer 2016

At Graduated Students School *** Remember to also verify the Years & Terms in the Graduated Students "School" for each year that is setup in the HS. (This is so that historical grades will appear correctly on transcripts printed from the Graduated Students school.)***

NOTE: There cannot be gaps between terms! The end date for each term must be the day before first day of the next term!

6. PS-EOY ***School Level*** Verify a default FTE is set for all grade levels in all buildings.

To access the FTEs for the upcoming school year, select the upcoming school year from the Term menu then navigate to Start Page > School Setup > Full-Time Equivalencies (FTE).

Click on the Full-Time/Regular FTE and confirm that default FTEs have been checked for each grade level.

7. PS-EOY ***School Level*** Verify Schedules are committed for each school that used PowerScheduler.

To verify schedules have been committed:

- 1) Navigate to DDE.
- 2) Choose the CC (4) table.
- 3) Search for TermID >= 2600
- 4) Check the box to "Search only in records belonging to" the school in which you're in.
- 5) Search all xxxx records.

NOTE: If no records are returned, schedules have not been committed. Please see your building personnel responsible for scheduling. End Of Year Process CANNOT be run unless schedules have been committed.

8. PS-EOY ***District level*** Exempt All Students from Fees

To exempt all students, navigate to District > Schools/School Info > (Pull up each individual school.) > Change the Fee Exemption Status under School Fee Information to "Students Exempted from All Fees".

NOTE: This will turn off the automatic assessment of fees. If necessary, fees can still be manually assessed for individual students.

9. PS-EOY ***School Level*** Verify fee balances

To verify fee balance, pull a list of fee balances from PowerSchool:

- 1) Perform a search of /*fee_balance.balance>0
- 2) For the selected students, choose "Export Using Template"
- 3) Choose "Students" for Type of Export
- 4) Choose "Student Fee Balance" (or "Fee Balance List") for the Export Template.
- 5) Select the Radio Button for the Selected xxx students.
- 6) Click Submit

Verify the outstanding fees in the exported list with your records.

PowerSchool End of Year Process Checklist - Summer 2016

Then, determine how the district's Fee Balances should be handled:

- 1) All Fees can be cleared and students set to zero,
- 2) All Fees can be rolled into a Start of Year Balance for students with outstanding fees, OR
- 3) All individual Fees and Fee Balances can be transferred from one year to the next (*This is the method used by most.*)

NOTE: CONNECT will take care of the Fees during the roll-over process; however, you will need to send an email to Student-Cherwell@ohconnect.org with your district's preference as to how fees are handled.

10. EMIS *School Level*** Verify that students in activities have been enrolled in Special Programs.**

To verify Special Program enrollments:

- 1) Search for students enrolled in each Activity Type by searching for the activity name followed by a # symbol (such as Activities.Football#). NOTE: To identify each activity, click on View Field List and select any of the fieldnames that start with Activities.
- 2) Click on the first student and select the Special Programs student screen.
- 3) Verify that a program enrollment for the current year is in place.
- 4) Use the arrow to the right of the List at the top left to navigate to the next student.
- 5) Repeat until all students have been verified.

If you do not want the activities to be carried forward to the next school year, clear activities for all students.
Start Page > System Administrator > Clear Activities

11. PS-EOY *District Level*** Check for duplicate students.**

Select, list & examine a student list for duplicates. The following selection process will yield all active, transferred out and pre-enrolled students.

To identify duplicate students:

- 1) From the Home Page, search for /enroll_status=0
- 2) In the additional Search box on the Student Selection page, enter +/enroll_status=2
- 3) In the additional Search box on the Student Selection page, enter +/enroll_status=-1
- 4) Export out the selected students using Quick Export from the group functions list:
Use fields such as:
Student_Number
LastFirst
DOB
State_StudentNumber

If duplicates are found, select the record to be eliminated, and transfer it out of school. You may change the last &/or first name fields to reflect "duplicate record". **Contact CONNECT if additional assistance is needed in merging the records.**

12. PS-EOY *School Level*** Verify all course grades are stored.**

13. PS-EOY *School Level*** Run reports before End of Year Process and save to .pdf**

PowerSchool End of Year Process Checklist - Summer 2016

Suggested Reports – There may be others also desired by your district to keep for historical purposes:

Report Cards

Transcripts (These will be used to print any future requested transcripts for Graduates.)

NCC/CONNECT Attendance Summary (Individual Student)

NCC/CONNECT Multi-Student Attendance Summary

Honor Roll

Class Ranking (NOTE: Notify CONNECT if you wish for Final GPA and Rank custom fields to be created for your graduates, and we will assist in populating these fields for Final Transcripts.)

Enrollment by Grade

□ 14. PS-EOY ***School and District Level*** Run Audit and Verification Reports to verify accuracy of data

PS-EOY *School Level*** School enrollment audit report**

Start Page > System Reports > Under the Membership and Enrollment section, School Enrollment Audit (If no students are found, this means you have no school enrollment issues). For any students found, check the Transfer Info records, and verify for accuracy.

PS-EOY *School Level*** Section enrollment audit report**

Start Page > System Reports > Under the Membership and Enrollment section, Section Enrollment Audit

Typically, students identified are non-attending, such as open enrolled out. For any students found, check their All Enrollments page and their Transfer Info page.

□ 15. PS-EOY ***OPTIONAL – School Level*** Clear locker numbers/combinations.

NOTE: If using the PDS Locker Management System, please refer to the documentation for handling clearing lockers.

To clear locker numbers and combinations:

- 1) Search /locker_number#
- 2) Then use the “Student Field Value” group function to clear fields.
- 3) Search /locker_combination#
- 4) Then use the “Student Field Value” group function to clear fields.
- 5) New locker numbers and combinations can be added individually or they can be imported.

NOTE: If students keep lockers from one year to the next and only the Grade 12 students lockers need to be cleared, use “/locker_number#;grade_level=12” and “/locker_combination#;grade_level=12” to search.

□ 16. PS-EOY ***OPTIONAL – School Level*** Assign Students to Homerooms.

Search: /home_room# (this search command selects students whose home_room field is not blank.)

Use the “Student Field Value” group function to clear the home_room field.

Enter home_room info individually on the student’s Modify Info page, or use the “Select Students By Hand” function to select students and then use the “Student Field Value” group function to set the home_room field.

NOTIFY CONNECT THAT YOU ARE READY FOR YOUR END OF YEAR PROCESS TO BE COMPLETED

PowerSchool End of Year Process Checklist - Summer 2016

IMPORTANT: When providing notification, you will need to:

- 1) Include phone numbers and email addresses for the Main Point of Contact and an Alternate Contact who will be available during your End of Year Process in case there are problems or questions,**
- 2) Which, if any, EMIS tab update scripts you wish to have run,**
- 3) How fees are to be handled, and**
- 4) Provide Connect with an export of Student Number, Name, Exit Code, and Exit Date of all of your students transitioning to the Graduated Students building so that we can verify them in our process.**

CONNECT will at that time coordinate with your district a mutually agreeable time for your End Of Year Process, during which time your PowerSchool server will be unavailable.

As part of the End of Year Process, CONNECT will perform the following functions:

- Run a Pre-End of Year Validation to ensure there are no outstanding items to be addressed.
- After a clear Pre-End Of Year Validation is returned, send an official notification to the district of the beginning of the EOY process.
- At the School Level, turn off the Parent/Student Access.
- Lock all users out of the system and set the server to unavailable.
- Perform a final Pre-End of Year Validation.
- Create a Pre-EOY backup of the Production Server in its current state
- Run various data check scripts, and if necessary, work with the district to clear up errors.
- If applicable, update Graduated Seniors' `Enroll_Status` to 0, for proper handling by the EOY Process.
- Perform Fee handling, as per the district's requested method.
- Run EOY Process
- If applicable, update Graduated Students with appropriate Exit Date
- Verify:
 - Promotion of students/transitions to new buildings
 - Graduates are in Graduated Students building
 - FTEs were assigned
 - Student schedules are present
- Restore Test DB with Pre-EOY backup
- Create Post-EOY backup of the Production Server
- Restore district (or, if requested, Project Manager only) access to server for End of Year data validation
- Notify Project Manager (or designee) of the End of Year Process completion.

PowerSchool End of Year Process Checklist - Summer 2016

Post End-of-Year Steps

After CONNECT has notified the Project Manager or designee of the End of Year Process completion, the below items should be done in **EACH** building in the ****16-17**** school year prior to notifying your end users of PowerSchool's readiness. Although many items were completed by CONNECT after the End of Year Process, please do a second verification of the data.

17. *****School Level*** Verify students were promoted.**

18. *****School Level*** Verify graduated students are now in the Graduated building.**

Use `/grade_level=99;Sched_YearOfGraduation=2016` and verify your count from last year.

19. *****School Level*** Verify FTEs are assigned to all students.**

20. *****School Level*** Verify Schedules are accurate.**

21. *****School Level*** Verify and update any retained students.**

22. *****School Level*** Update any attendance codes that will be in place for the new school year.**

Start Page > School > Attendance Codes

As a reminder, all codes that will be used in Daily Attendance reporting should have both the "This attendance code is considered in ADA calculations" and the "This attendance code counts toward membership" boxes checked!

NOTE: If changing any attendance codes, notify CONNECT of any changes so that the Attendance Reports can be updated.

23. *****School Level*** Update any attendance code categories for the new school year.**

Start Page > School > Attendance Code Categories

NOTE: For the functionality of the totals on the Quick Lookup screen, do not modify the Excused, Unexcused or Tardy Attendance Code Categories

24. *****School Level*** Update/Verify attendance conversions for the new school year.**

The End of Year (EOY) process alters the Attendance Conversions in each building.

Start Page > School > Attendance Conversions>Defined

Check to make sure all of the values are entered correctly. Refer to last year for verification.

As a reminder, any full-day absences should have a multiplier value of 0, any half-day absences should have a multiplier value of 0.5 and any present days (such as Field Trips, ISS, etc.) should have a multiplier value of 1.0.

NOTE: If Attendance Conversion Values are modified, notify CONNECT of any changes so that the Attendance Reports can be updated.

PowerSchool End of Year Process Checklist - Summer 2016

25. *****School Level*** Verify Bell Schedules**

Start Page > School > Bell Schedules

26. *****School Level*** Verify Days are accurate.**

Start Page > School > Days

27. *****School Level*** Verify that Periods are accurate.**

Start Page > School > Periods

28. *****School Level*** Verify that the school year calendar is setup.**

Start Page > School > Calendar Setup

29. *****School Level*** Schedule elementary students as needed.**

30. *****School Level*** Reset Class Counts**

If the Course Sections are showing zero counts for enrollment:

Start Page > System > Special Operations > Reset Class Counts

This will populate the number in the sections for each course.

31. *****District level*** Verify school enrollment fees are accurate if applying at school level.**

At District Level, switch to 16-17 Year term – **District > Schools/School Info > (Pick the school.) > Add/Adjust “School Enrollment Fees”**

32. *****District level.*** Verify course fees are accurate if applying at course level.**

At District Level , switch to 16-17 Year term – **District > Courses > (Pull up the course.) > Click Fees . Adjust as necessary.**

33. *****School level*** Turn on public access to site.**

From the School Setup > Parent/Student Access screen, uncheck the box to re-enable Parent/Student Access.

EMIS-Specific Related Fields To Be Updated Post-EOY Process

34. **Verify your Local District Attendance Patterns**

35. **Create FY17 Grade Schedule (DL)**

36. **Update your Organization General Info (DN)**

37. **Update students’ Local Attendance Patterns on the FD record**

To mass update the students’ FD tab Local Attendance Pattern field, take the following steps:

- 1) Select the students who have the same attendance pattern.
- 2) Choose Quick Export from the Functions dropdown box.
- 3) Export out the following fields:
 - a. Student_Number
 - b. LastFirst
 - c. S_OH_STU_FD_X.Local_Att_Pattern

PowerSchool End of Year Process Checklist - Summer 2016

- 4) In the spreadsheet that exports, fill in the S_OH_STU_FD_X.Local_Att_Pattern column with the LAST 2 CHARACTERS of the desired Local Attendance Pattern Code (For example: If your code is supposed to be KGK1, fill the column with K1. If your code is supposed to be KGK2, fill the column with K2. If your code is supposed to be KG**, use **. If your code is supposed to be ****, use **.).
- 5) Save the file as a text tab-delimited file.
- 6) Navigate to Special Functions > Importing & Exporting > Quick Import
- 7) Choose the Students table
- 8) Choose the Windows ANSI character set
- 9) Browse to the text tab-delimited file that you just saved
- 10) Make sure the "Suggest field map" box is **checked**
- 11) Click the blue Import button
- 12) Verify the field names match between the two columns
- 13) Check the box next to "Check to exclude first row"
- 14) Select the radio button next to "Update the student's record with the information from the file being imported..."
- 15) Click the Submit button.

❑ 38. Update students' State Grade Level Equivalent fields on the FD record

This can be done individually on the State/Province-OH student screen, or processed in groups by updating the OH_State_Grade_Level field with an import or using the Student Field Value group function. Valid values for this field are the values in parenthesis on the FD tab, item 3.

❑ 39. Update students' grade level, next year field FN record.

This can be done individually on the State/Province-OH student screen, or processed in groups by updating the S_OH_STU_FN_X.Next_Year_Grade field with an import or using the Student Field Value group function. Valid values for this field are the values in parenthesis on the FN tab, item 5.

❑ 40. Update students' retained reasons on the FN record.

This can be done individually on the State/Province-OH student screen, or processed in groups by updating the S_OH_STU_FN_X.Retained_Status field with an import or using the Student Field Value group function. Valid values for this field are the values in parenthesis on the FN tab, item 4.

❑ 41. Populate the Next Year Building field

This can be done individually on the State/Province-OH student screen, or processed in groups by updating the S_OH_STU_FN_X.Next_School field with an import or using the Student Field Value group function. Valid values are the six-digit IRN of the next building. Not necessary to update if using the Default Value.

❑ 42. If your district populated the **Attending Building IRN for EMIS on the FS tab** rather than allow it to default, the value must be updated for students who have changed buildings. In most cases, this field should not be populated, as the values for these reporting elements are calculated. The exception would be if the district is using an electronic building; students in that building will need every field that contains an IRN populated.

❑ 43. Notify CONNECT that your district has completed PowerSchool End-of-Year via student-cherwell@ohconnect.org. CONNECT at this time will take a final Post-End of Year backup of the Production Server.