

Start of Year Checklist

**Any items marked with an asterisk, refer to the Start of Year Notes pages at the end of the checklist.*

District and School Administration

- Verify that the system includes Entry, Exit, and Ethnicity Codes
District Office Start Page> District> Entry Codes (or) Exit Codes
No changes from the previous year are currently required by ODE.

District Office Start Page > District> Federal Ethnicity and Race Settings
No changes from the previous year are currently required by ODE.
- Verify Assessment of Automatic Fees
If your district uses PowerSchool's fee system, review your district's school enrollment fees and course enrollment fees.
- School Fees- Update as needed*
District Office Start Page> District> Schools/School Info> [School Name]> (Setup)
- Course Fees - Update as needed*
School Start Page >School > Fee Types
 - Verify Assessment of Automatic Fees- Spot check student fees
 - Assess any other fees
 - Review and Update School Information
District Office Start Page> District Setup >Schools/School Info
 - (If using) Review Powerlunch Prices and Options
Start page > Powerlunch >Set Prices and Options
 - Update the Default Term Level*
Start Page> School Setup > Miscellaneous
 - (If using) Update the School Bulletin*
Start Page >Special Functions > Daily Bulletin Setup
 - (if using) Set Up Sub Sign In Settings
Start Page >School Setup >Sub Sign In Settings

Start of Year Checklist

- Verify Staff Setup and Accounts - District Leaders May Do This
Staff >Security Settings >Change Default School as Necessary
- Mobile Apps Settings - District Leaders May Do This
District Setup >Miscellaneous > Enable Mobile Web
Pages >Configure PowerSource Registration >Submit

Scheduling

- Review Years and Terms
Start Page> School Setup> Years & Terms
- Review Periods and Cycle Days
Start Page >School Setup > Periods
Start Page > School Setup > Days
- Review Bell Schedules
Start Page > School Setup > Bell Schedules
- Verify Bridge Period - Only One Bridge Period Per Building
School >Bell Schedules >Edit Schedule >Select Period
- Complete Calendar Setup
Start Page >School Setup >Calendar Setup
- Check Class Counts and have District Leader run Special Operations if needed
Master Schedule >List View >Verify there are not 0's for number of
students
- Mark Sections not graded i.e. Lunch, Study Halls, Advisory*
School Setup >Sections >Select Course >Section Number >Exclude From
Storing Final Grade
- Modify Student Information i.e. Grade Plan Selection for Freshman & New
Search for Blank Grad Plan: GradPlan# Results >Graduation Plan
Selection >Enter Action & Graduation Contract >Submit
- Pre-register Students
Start Page > Enroll New Student

Start of Year Checklist

- Schedule Pre-registered Students
Start Page > Search for the student> Modify Schedule

Attendance

- Review Attendance Codes, Categories, and Conversions
Start Page >School Setup> Attendance Code Categories
- Review Full Time Equivalencies and Conversions
Start Page > School Setup > Full Time Equivalencies (FTE)
Click on, "defined" for full time FTE and make sure conversions are complete
- Review Attendance Preferences
Start Page >School Setup > [Attendance] Preferences

Grading and Assessment

- Review GPA Calculations*
District Office Start Page > District Setup > GPA Calculations
- Complete Final Grade Setup*
Start Page >School Setup > Final Grade Setup
- Update Current Grade Display*
Start Page> School Setup > Current Grade Display
- Update GPA Student Screens*
Start Page> School Setup> GPA Student Screens
- Review Honor Roll Levels*
Start Page > School Setup > Honor Roll
- Review Class Rank Methods*
Start Page > School Setup >Class Rank> Class Rank Methods

Start of Year Checklist

Reports

- Update DATs in User Defined Reports*
Start Page >System Reports > Setup tab
- Run Student Picture Template - As Needed
Select Students>Special Functions>Importing & Exporting>Export Using Template>Students>Photo Company Export>Submit
- Run Direct Certification Template - As Needed
Select Students>Special Functions>Importing & Exporting>Export Using Template>Students>Direct Certification>Submit
- (If using) Update Reporting Segments
Start Page >School Setup > Reporting Segments

Student Information

- Update Missing Student Information (FTE, Gender, Ethnicity)*
- Verify Membership Share
Search All Students Membership: Membershipshare#1
If Students are found from this search, update
Students>Student Field Value>Select membershipshare field from List>Enter 1> Submit
- Enrollments Verify School
Start Page > System Reports> School Enrollment Audit
To search for Current & Pre-Registered students: /enroll_staus in 0,-1
- Search to show students with different enrollment School ID
Search: schooled=your irn here;enrollment_schoolid#your irn here
- Apply Credit for Advanced Courses*
Start Page > Search for the student> Historical Grades > DetailView
- Enroll Students in Activities*
Start Page >Search for the student >Activities

Start of Year Checklist

- Fill in Home Room on Modify Information Screen
Teacher Schedules>Select Teacher>Identify Period and Select Enrollment>Make Current Selection>Student Field Value>Home_Room>Insert Room #>Submit

- With the Same Selection - Complete in 3rd Party Vendor Information
Fill zz_homeroom with Room Number (6 characters) Ex. 123 or 3Smith
Fill zz_teacher with First Initial and first five letters of last name Ex. TNorth

Access to PowerSchool Student and Parent Portals*

- Enable Parent and Student Web Access to the Public Portal*

Verify School Entry Date on Modify Info Screen*

- Assigning lockers*

- Printing schedules for the upcoming school year*

Start of Year Checklist

Notes for Start of Year

Course Fees:

Helpful search command: *Enrolled_in=[course] e.g. *Enrolled_in=ART2100.1

*If fees do not assess automatically, they can be assessed manually
(by group or all):*

School Office Start Page > Special Functions > Fee Functions > Assess School Enrollment Fees > Submit
AND...

School Office Start Page > Special Functions > Fee Functions > Course Enrollment Fees > Submit

School Fees:

NOTE: If your school wishes to delay the assessment of school and/or course enrollment fees, set the field "Fee Exemption Status" to Students Exempted From (course, school, or all) fees. This will prevent all students in this school from being assessed during the enrollment process or when courses are added to the schedule. When the school is ready to begin assessing fees, this field can be changed back to "Students Not Exempted".

Update Default Term Level:

Note: The default term level setting determines which term level is displayed at the top of the PowerSchool pages. It also controls the term teachers see in PowerTeacher. (In order for the new term level to be displayed, you must sign out of PS and sign back in.)

Update the School Bulletin:

Note: The Daily Bulletin was cleared as part of the End of Year Process.

Note: This is School/Building Specific (If you elect to include the current date as a prefix to the password that was entered in the Substitute Sign In Password field, the number for each day is the prefix to the password entered and changes daily. For example, if the password is sub, and the current day's date is 10/25/2012, the substitute password for today would be 25sub.)

Start of Year Checklist

Mark Sections not graded:

Note: Make sure to do this on the section. If this is completed on the course, the course will not print on Schedules

Review GPA Calculations:

Note: Review the GPA calculations setup at the district for any term-specific information. For instance, a GPA calculation may be set up to only include grades from a certain school year. If you wish to use the same GPA calculation for the current year, you may have to adjust the school year settings for that GPA calculation, or create a new GPA calculation. The majority of schools use a "projected" calc method for current year GPA displays. Make sure the year field is set to 2013.

Complete Final Grade Setup:

Note: Set up final grade reporting terms for each school. Final grades define the length of each grading period for a particular scheduling term. The start date and end date of a grading term determine which grade book scores (assignments, tests, projects, etc.) are included in a particular final grade.. If giving exams, make sure you end Q2 a couple of days prior to semester end, and set your exam bucket for those days so term weighting works correctly. Example: S1=8/22/2013-1/10/2014, Q2=11/1/2013-1/8/2014. E1=1/9/2014-1/10/2014. This will permit term weighting to work correctly. Likewise you would have to do this for Q4. If you have quarter length classes with exams, i.e. Whitmer, you will have to do this for all quarters. Be sure to work with your administrators to set final grade deadlines once final grade setup is complete.

Update Current Grade Display:

Note: Current grade display settings control the grade display on the Quick Lookup student screen as well as the current grade display throughout PowerSchool. The following settings should be updated at the end of each reporting term throughout the school year:

- a. Update the columns to display on the Quick Lookup student screen
- b. Update the source of data for each column so that grades are initially returned from the grade book
(current grades) instead of Historical (stored) grades
- c. Update the Current Grade field
- d. Update the Parent/Student Access Term field, will need to be set to 13-14.

Start of Year Checklist

Update GPA Student Screens:

Note: The settings on the GPA Student Screens setup page determine which GPA calculation method is used for the current GPA on the Quick Lookup student screen and which data is displayed on the Cumulative Information student screen.

Verify the following settings at the start of the school year:

- a. If needed, update the GPA calculation method to be used as the current GPA on the Quick Lookup student screen*
- b. Review any of the data access tags used in each of the 10 rows for the Cumulative Information student screen, and then update any term-specific data access tag attributes if necessary. This is common with data access tags related to attendance and GPAs.*

Review Honor Roll Levels:

Note: Configure honor roll methods and levels at each school. The grades included in the honor roll calculations are based on the associated GPA calculations setup at the district office.

At the start of the school year, review the GPA Calculation associated with each honor roll level to ensure that the calculation is configured properly for the current school year.

Review Class Rank Methods:

Note: Configure class rank methods at each school. Class rank is used to rank students based on GPA. Setting up class rank involves selecting or setting up a GPA calculation method at the district, defining a class rank method at the school and calculating the class rank at the school.

At the start of the school year, review each class rank method and ensure each is associated to the correct GPA calculation method.

Review Class Rank Calculation Frequency- It is recommended the frequency be set to either daily (updates rank with any new historical move in information nightly) or with the storing of grades.

Update DATs in User Defined Reports:

Note: Object reports, form letters, and report cards are all user-definable reports that often contain term or year-specific information in data access tags. At the start of the school year, review the elements used in each report to ensure any term specific information has been updated for the current school year or the current term if you wish to use that report during the new school year.

*Example: The A(*gpa) data*

*access tag can be used in a report card footer to return a student's GPA based on a specific method. It is possible to specify a year in which to query grades for the GPA calculation. If any of your reports include the A(*gpa) data access tag with a year parameter, update the year value accordingly for the upcoming school year. The following instance of the A(*gpa) data access tag will return a GPA value using the "Simple" method and will only include grades from the 2013-2014 school year. A(*gpa method="simple" year="2013")*

Start of Year Checklist

Update Missing Student Information:

Note: Review student records periodically for blank or invalid values in commonly required fields. Student records with missing information may often lead to unexpected results in various PowerSchool reports.

For example, Search for students without a full-time equivalency. If any students are returned, update their current school enrollment on the Transfer Info student screen with an FTE. Students without an FTE will cause invalid ADA calculations. Perform the following search on the Start Page:FTEID=

Apply Credit for Advanced Courses:

Note: Some students take advanced classes in 8th grade for high school credit. You can apply the credit the students earned for the advanced courses before they begin 9th grade so that it will be included on their high school transcripts. Assuming that the grade for the course was stored at the middle school, you can access the student's historical grade record at the high school and change the historical grade level in which the advanced course was taken.

Enroll Students in Activities:

To enroll a group of students in an activity:

Start Page > Select a group of students > Group Functions > Student Field Value

- 1. Enter the field name associated with the activity as the Field To Change.*
- 2. Enter 1 as the New Field Value.*
- 3. Click Submit.*

Access to PowerSchool Student and Parent Portals:

After completing a school year, it is common for PowerSchool administrators to disable student and guardian access to the PowerSchool Student and Parent Portals while school is not in session (during the summer months). Use the ID/Password Assignment group function to generate user names and passwords for new students and guardians, and to enable student and guardian access to the Student and Parent Portals for the upcoming school year.

For districts using the single sign-on feature, it is NOT necessary to recreate web id's and passwords for parents/guardians. Doing so will cause duplication, confusing emails to users and countless phone calls to the school! If users report that they cannot get into the portal, simply direct them to the "Having trouble signing in?" link.

Start of Year Checklist

Enable Parent and Student Web Access to the Public Portal:

Note: A value of one(1) in these fields' means enabled and a value of 0 means disabled.

1. Select the students that you want to enable Parent and Student web access for from the Student Search Page.
2. Select from the "Select a function for this group of students" at the bottom of the page the function of Student Field Value.
3. In the Field To Change enter AllowWebAccess
4. In the New Field Value enter a 1, and click submits.
5. This will take you to a confirmation screen with a warning on it of WARNING: This change is irreversible. Clicks submit at the bottom and the Parent Web Access will be enabled.
6. Click on the cookie crumb above with the name of Student Field Value.
7. In the Field To Change enter Student_AllowWebAccess
8. In the New Field Value enter a 1, and click submits.
9. This will take you to a confirmation screen with the following message- WARNING: This change is irreversible. Click submits at the bottom and the Student Web Access will be enabled.

Verify School Entry Date on Modify Info Screen

For the new 13-14 PS users, the entry date should be your first day of school.

For veteran PS users: This School Entry Date represents the first date a student was physically attending classes in a specific school building. This date does not represent the first day of the school year. The initial School Entry Date was set to the first day of the school year we were importing into per Pearson import recommendations. Our setting this date to that first day allowed all the PowerSchool functions to work. That date must be equal to or before the first transfer info record in order for all to work properly. What this means, is for the 11-12 implementation districts, if a student did not change buildings, the School Entry date remains as we set it in 2011. If a student changes buildings though, it does appear a district must change that School Entry date to the first day the student is attending in the new building. It does not change during EOY. If a student enrolls after the first day of the school year, that School Entry date is their admission date.

For districts needing to modify this date:

Select the group of students (possibly by grade level) > Student Field Value > Fields to Change: SchoolEntryDate >New Field Value: (enter first day of school)> Submit, Verify that the changes you are about to make are correct and hit Submit again.

Start of Year Checklist

Assigning lockers:

1. From PowerSchool select the students by building and/or grades, etc. for which lockers assignments are needed.
2. Using the quick export, generate an output file including only the student_number for the selected students. Export this into a tab delimited file.
3. Open the tab delimited file in Excel. We will call this the locker Import spreadsheet
4. In the column next to the Student_number, enter the word "Random" in the header column.
5. In the first cell of the column enter the function =RAND() and press the 'enter' key.
6. Using Excel, copy that function to the remaining cells in this column. This will populate a random generated number for each student. This random function generated number will default to 5 decimals. The recommendation is to take the default.
7. Using the Excel Sort capabilities, sort the entire spreadsheet using the "Random" column value as the primary field to sort on as desired. The sort will be deceiving as it appears nothing is happening since neither column will appear to be 'sorted'. If you choose to sort this multiple times, the record order will change each time.
8. Open the locker combinations spreadsheet
9. Select the locker number column and paste it into the next open column of the Locker Import spreadsheet
10. Select the column of the locker combination rotation in use for the current school year and paste that into the next open column of the Locker Import spreadsheet
11. Label the column with the locker number; "Locker_Number"
12. Label the column with the locker combination; "Locker_combination"
13. Delete the extra rows of data for which there are no students to assign to lockers•these will be at the bottom of the spreadsheet, the student_number will be blank.
14. Delete the column named "Random"
15. Using the PowerSchool Quick Import, import the data into the appropriate building. Watch for 'red' entries during the import; update manually any records as needed to assign lockers.

Printing schedules for the upcoming school year

If printing schedules for the upcoming school year

Select your school > system reports > set up tab > report cards > find your schedule report and open it > click on schedule listing > look for check box that says "print future schedules". This needs to be unchecked after EOY.