PowerSchool End-of-Year Process

Management Technology Helpdesk

NOTE: **This process should be performed**:

- After all final grades have been stored
- You are ready to commit your schedule
- The Teacher Student Data Link submission has been submitted to the state
- After the 5-Year Follow-Up Survey has been completed for current graduates

Contents

End-of-Year Data Preparation

Prior to running the End-of-Year Process, <u>it is recommended to prepare and validate data</u>.

Validate Enrollment Dates

Validate section enrollment and school enrollment data using the Section Enrollment Audit report and the School Enrollment Audit report. These reports will help identify any entry and exit date discrepancies with section or school enrollments. Make any corrections necessary.

The below functions can only be run at the school level.

Section Enrollment Audit

Start Page > System Reports > Section Enrollment Audit

Use the Section Enrollment Audit report to detect:
- Students enrolled in school, but not in any classes
- Students with course date misalignments with school enrollments

School Enrollment Audit

Start Page > System Reports > School Enrollment Audit

Use the School Enrollment Audit report to detect:
- Students with enrollment date overlap or misalignment

Clear Scheduling Setup Screen for Inactive Students (District Office)

From the Start Page, search for all inactive and transferred out students from the current school year using the search command:

/enroll_status in -2,1,2,3,4; entrydate>=MM/DD/YYYY (MM/DD/YYYY=first day of school)

Clear the following scheduling setup fields for inactive/transferred out students:

- Next Year Grade (Sched_NextYearGrade)
- Schedule This Student (Sched_Scheduled)
- Year of Graduation (Sched_YearOfGraduation)
- Next School Indicator (Next_School)

Next Year Grade/Next School Indicator

The next year grade and next school indicator are both assigned to each student on the Scheduling Setup screen (*Start Page > Select Student > Scheduling Setup*).

The next year grade indicator (Sched_NextYearGrade) is used to determine the grade level that a student will be assigned to for the next school year.

The next school indicator (Next_School) is used to determine the school that a student will attend in the next school year.

There are several ways to check the next year grade and next school indicator: (Run at the school level)
- List Students Function
- EOY Grade and School Checker Report (Engine)
- Roll Over Errors Report (Custom Reports)

List Students Function

1. From the Start Page, search for all active and pre-registered students using the search command: **/enroll_status in -1,0**

   NOTE: When confirming pre-registered students, the current school and current grade will be the same as their next year school and next year grade.

2. Select List Students from the Group Functions menu below the search results.
3. On the List Students page, enter the following fields:

Field Name	Column Title
LastFirst	Name
SchoolID	Current School
Grade_Level	Current Grade
Next_School	Next Year School
Sched_NextYearGrade	Next Year Grade

4. Click submit.
5. Read through the list and verify that all students have the correct next year grade and next school displayed.
6. Make note of any student with incorrect or missing information. Correct in the Scheduling Setup screen.

EOY Grade and School Checker Report

Start Page > System Reports > Engine Tab > EOY Grade and School Checker

This report can only be run at the school level.

This report will list students along with their grade level, next year grade level, and next school. The report will highlight any students that have a next year grade level that is less than or equal to the current grade level or if the next year grade level is more than one grade higher than the current grade level. The report will also highlight any student that does not have a next school assigned.

**NOTE: This report must be run with a selection of students less than 1000. If more than 1000 students are selected, the report will produce a blank report with headers only.

Roll Over Errors Report

Start Page > System Reports > Custom Reports Tab > Validation Section > Roll Over Errors

This report will list students and display **errors** such as:
- Active Student, Next Year Grade = (0,0)
- Pre-Enrolled, Next Year Grade should match current grade
- Active/Pre-enrolled student with no school set for next year
- Next Year Grade suggests Graduating but Next year school does not
- Next Year School suggests Graduating but Next year grade does not
- Next Year Grade not in grade range for school
- SchoolID and Enrollment SchoolID should match for Active/Pre-enrolled students

Print Reports/Export Data

Prior to the End-of-Year Process, run/print any reports or export any data your district may send home or archive for the current school year.

Some examples being:
- Report Cards
- Transcripts
- Object Reports/Form Letters (Ex: Fees - Do both reports)
- Attendance Reports
- Teacher Gradebook Reports
- Historical Grades Data
- 5-Year Follow-Up Survey Data (Requested by MISD)

5-Year Follow-Up Survey Data Export

Current year (June 20## class) graduate data should be exported and archived for each of your high schools for when the MISD requests data for the 5-Year Follow-Up Survey. Make sure to save the file with the correct school name and graduating class year. Below are the data requirements with **sample** instructions that the MISD usually sends out with their request for data. Save this data for your current year graduates.

This year, for our 5-Year Follow-Up, we are collecting information for the graduating class of 2021. This email may be forwarded to your Pupil Accounting person familiar with exporting files from your pupil accounting system. In 2021, your school was most likely using PowerSchool. The information needed is in the list below. Thank you for your cooperation in this important effort.

INFORMATION NEEDED

This list should include *all* students, not just CTE, who *graduated* from your high school in 2021. (Senior who only attended but did not graduate should not be included.)

Please put the information into an **Excel** file. The file should be named in the following format: "YourSchoolNameClassof2021" and then saved to the secure FTP site and the Help Desk should be emailed when complete. If you have any questions, please contact the Help Desk at **help@misd.net** or 586-228-3399.

> Required fields should be saved in this order:
> - Last name
> - First name
> - Middle initial
> - Gender
> - GPA
> - Date of birth - MM/DD/YYYY
> - House Number
> - Address (including apartment or lot numbers)
> - City
> - State
> - Zip code
> - Phone (including area code)
> - School
> - Parent Information*

*Parent Information is used to help in our use of a People Finder program to locate student's new address. It is particularly helpful to have the first and last name of whomever the student was living with in 2021; especially since that person often has a last name that is totally different from the student's. For the Parent Information field, we'll take whatever information you have; whether it is in one cell or in separate cells, such as, one with father's last name, father's first name, mother's last name, and mother's first name. All of it helps. Please put Parent Information in the last of the cells.

Years and Terms

Years and terms affect many aspects of PowerSchool, such as the calendar setup, scheduling, enrollment, and final grades.

You must create the new school year for all schools in your district whether you are using the school or not. This includes District Office and the Graduated Students School. This must be created on the live-side.

When setting up the new school year, give yourself an extra day due to any adjustment in the calendar.

When setting up your terms (EX: S1), the end dates need to be "true" end dates. This affects the exit date for students in the CC table.

When performing the End-of-Year Process, PowerSchool uses the first day of the term for the student's entry date and the day after the last day of the term for the student's exit date.

Upon creating a new school year, PowerSchool creates the following attendance setup items:
- Attendance Codes
- Attendance Code Categories
- Attendance Preferences
- Attendance Conversions
- Bell Schedules
- Full-Time Equivalencies
- Calendar Day records are created for the new school year

For school buildings using PowerScheduler, all terms should be defined within PowerScheduler in the Years and Terms setup area. These will copy over and overwrite any years and terms defined on the live-side.

For school buildings not using PowerScheduler, all terms should be defined on the live-side only.

Clear Activities

Start Page > System > Clear Activities

All student activities are automatically carried over during the End-of-Year Process. Clear any student activities that should not carry over into the next school year. This task can be accomplished by using the Clear Activities function.

Full-Time Equivalencies

Start Page > School > Full-Time Equivalencies (FTE)

Verify that each school building has the necessary Full-Time Equivalencies setup. Full-Time Equivalencies are used for certain attendance calculations.

Fees

Configure school and course enrollment fees. School enrollment fees are assessed automatically when running the End-of-Year Process. Course enrollment fees are assessed when committing your schedule from PowerScheduler to the live side. Both school and course enrollment fees may also be assessed individually or in mass after enrollment in a school or course.

When the End-of-Year Process is run, only the balance is rolled over into a Start-of-Year (SOY) fee. All individual detailed fee information is no longer available.

The below functions can only be run at the school level.

Printing Fees Invoice

To print the Fees Invoice report, follow these steps:

1. From the Start Page, search for students with outstanding fees by using the search command:
   *fee_balance.balance>0
2. Select Print Reports from the Group Functions menu below the search results.
3. Select the Fees-Invoice report.
4. Click submit.

List Students/Export of Student Fee Balance

To list students and/or export students and their fee balance, use the following code:

- List Students: fee_GetStudentBalance
- Quick Export: ^(fee_GetStudentBalance)

Transfer Info and Graduation Information

It is necessary to update the graduated students exit code, exit date, and graduation information fields located on the Transfer Info and Graduation Information screens.

Transfer Info > Current Enrollment record
Custom Screens > Graduation Information

Create the Export File

1. Navigate to the Transfer Info and Graduation Information report:
   Start Page > System Reports > sqlReports > End Of Year Process > Transfer Info and Graduation Information

2. Key in **9/30/20##** in the Entry Date parameter

3. Click the submit button

4. Once the report generates, click the **TAB** button at the top of the report to download a text tab-delimited file

5. Review the saved file in Excel and make any necessary corrections

6. Save the file as a text (tab-delimited) file

Import the Export File

The below function should only be done at district office.

1. Navigate to the Quick Import screen:
   Start Page > Special Functions > Importing & Exporting > Quick Import

2. Select the Students table from the drop-down menu.

3. Leave the Field delimiter, End-of-line marker, and Character Set to their default values.

4. Browse for the saved file.

5. Leave the Suggest field map box checked.

Option	Value	
Table:	Students	⌄
Field delimiter:	Tab ⌄	
End-of-line marker:	CR ⌄	
Character Set:	Mac Roman ⌄	
File to import:		Browse...
Suggest field map	☑	
School	District Office	

Import

6. Click import.

7. Map the fields the data will be imported in to:

From File	To PowerSchool
LastFirst	LastFirst
Student_Number	Student_Number
SE	(do not map)
EMC	(do not map)
IAM	(do not map)
ExitDate	ExitDate
U_MISD.GradDate	U_MISD.GradDate
ExitCode	ExitCode
U_MISD.GradCode	U_MISD.GradCode
U_MISD.GradStatus	U_MISD.GradStatus
Graduated_SchoolName	Graduated_SchoolName
Graduated_SchoolID	Graduated_SchoolID
U_MISD.HSCohortYear	U_MISD.HScohortYear

8. Make sure **Check to exclude first row** is checked.

9. Make sure to select the radio button: **Update the student's record with the information from the file being imported**.

10. Click submit.

11. Verify all records imported successfully.

Populate the Class Rank and GPA Fields

The class rank and GPA fields on the Graduation Information screen will be updated by an import of data into the Students table within PowerSchool.

The below should be performed at the school level and students should be selected.

NOTE: For the IAM and 5th year ECM student, "Other District" consortium "Other Info" – check to exclude from Class rank.

1. Open a new tab and navigate to the Quick Export screen:
   Start Page > Special Functions > Importing & Exporting > Quick Export

2. Enter in the following fields:
   - Student_Number
   - LastFirst

3. Switch back to the other tab and navigate to the GPA Student Screens:
   Start Page > School > GPA Student Screens

4. Copy the class rank method from the GPA Student Screens.

5. Switch back to the Quick Export screen and paste the copied method under the LastFirst field.

6. Switch back to the GPA Student Screens tab and copy the cumulative GPA (NOT current) method.

7. Switch back to the Quick Export screen and paste the copied method under the class rank method.

8. Click submit and save the file.

9. Review the saved file in Excel and make any necessary corrections.

10. Navigate to the Quick Import screen:
    Start Page > Special Functions > Importing & Exporting > Quick Import

11. Select the Students table from the drop-down menu.

12. Leave the Field delimiter, End-of-line marker, and Character Set to their default values.

13. Browse for the saved file.

14. Leave the Suggest field map box checked.

15. Click import.

16. Map the fields the data will be imported in to:

From File	To PowerSchool
Student Number	Student_Number
Student Name	LastFirst
Class Rank Method	U_MISD.GradClassRank
GPA Method	U_MISD.GradCumulativeGPA

17. Make sure **Check to exclude first row** is checked.

18. Make sure to select the radio button: **Update the student's record with the information from the file being imported**.

19. Click submit.

20. Verify all records imported successfully.

Transcript Attendance

Use this process to update the Attend tab on the State/Province–MI page. The data from this report can be used to track student membership for each school year and can be pulled onto the student transcript.

NOTE: Recommended that transcripts are processed and saved the day after school gets out.

System Reports > State Tab > MI Attendance for Transcript

1. On the report interface, select the option to run for All Students.
2. Enter in the Start Date of the school year.
3. Enter in the End Date of the school year.
4. Click submit.
5. When the report is completed, right click on the completed link and save the CSV file to a location on your computer.

Importing into PowerSchool

1. Navigate to the Quick Import screen:
   Start Page > Special Functions > Importing & Exporting > Quick Import
2. Select the Students table from the drop-down menu.
3. Select Other from the Field delimiter drop-down menu and enter a comma in the box to the right.
4. Leave the End-of-line marker and Character Set to their default values.
5. Browse for the saved file.
6. Leave the Suggest field map box checked.

7. Click Import.
8. All fields that need to be imported will automatically map to the correct PowerSchool field name. Fields after S_MI_STU_GC_X.att12grDaysEnroll will not map and should not be mapped.
9. Make sure **Check to exclude first row** is checked.

10. Make sure to select the radio button: **Update the student's record with the information from the file being imported**.

11. Click submit.
12. Verify all records imported successfully.

End-of-Year Process Validation

The End-of-Year Process includes a validation mode during which the system will evaluate student, school, and district information for End-of-Year readiness. The End-of-Year Process will not run unless all students and schools are properly configured for new enrollments in the upcoming school year.

The below can only be performed at the district level and make sure to have the year set to 20-21 for the 21-22 school year.

Setup End-of-Year Process Screen

Start Page > System > End-of-Year Process

The End-of-Year Process screen requires set up and verification of three areas:

- Validation of the High Grade and Default Next School
- Setup of the Exit Code for Current Enrollment, Entry Code for New Enrollment, and Exit Comment for pre-defined types of students
- Transfer Method of Fees

Validate High Grade and Default Next School

Validate that each school in the district is set up with a valid high grade and a valid default next school for students that are in the high grade.

If any modifications are required, these can be made on the Schools/School Info screen. (*Start Page > District > Schools/School Info > Select a School*)

	School	School Number	(1) High Grade for each School	(2) Default Next School for Students in High Grade
1.	Elementary School 1	111	5	444
2.	Elementary School 2	222	5	444
3.	Elementary School 3	333	5	444
4.	Middle School	444	8	555
5.	High School	555	12	999999
6.	Graduated Students	999999	0	0

Exit Code for Current Enrollment

Select the appropriate exit code for each type of student: Graduating, Promoted to next school, Promoted within same school, Retained, and Demoted. The End-of-Year Process assigns these exit codes to each student's current enrollment based on a comparison of the student's current school, next school indicator, current grade level, and next grade level.

Type of student	Exit Code for Current Enrollment	Entry Code for New Enrollment	Exit Comment	Replace Existing Values?
Graduating	01 (Graduated from General Education)	N/A	Graduated	☐
Promoted to next school	19 (Continue in District)	R2 (Return from Last Year)	Promoted Next School	☐
Promoted within same school	19 (Continue in District)	R2 (Return from Last Year)	Promote Same School	☐
Retained	19 (Continue in District)	R2 (Return from Last Year)	Retained	☐
Demoted	19 (Continue in District)	R2 (Return from Last Year)	Demoted	☐

Fees: Transfer Method   ⦿ Roll over the current balance ◯ Zero the current balance

⚠ Perform EOY Validation

Perform End-of-Year Processing

Entry Code for New Enrollment

Select the appropriate entry code for each type of student: Graduating, Promoted to next school, Promoted within same school, Retained, and Demoted. The End-of-Year Process assigns these entry codes to each student's new enrollment based on a comparison of the student's current school, next school indicator, current grade level, and next grade level.

Type of student	Exit Code for Current Enrollment	Entry Code for New Enrollment	Exit Comment	Replace Existing Values?
Graduating	01 (Graduated from General Education)	N/A	Graduated	☐
Promoted to next school	19 (Continue in District)	R2 (Return from Last Year)	Promoted Next School	☐
Promoted within same school	19 (Continue in District)	R2 (Return from Last Year)	Promote Same School	☐
Retained	19 (Continue in District)	R2 (Return from Last Year)	Retained	☐
Demoted	19 (Continue in District)	R2 (Return from Last Year)	Demoted	☐

Fees: Transfer Method   ⦿ Roll over the current balance ◯ Zero the current balance

⚠ Perform EOY Validation

Perform End-of-Year Processing

Exit Comment

Type in an exit comment for each type of student: Graduating, Promoted to next school, Promoted within same school, Retained, and Demoted. The End-of-Year Process assigns these exit comments to each student's current enrollment based on a comparison of the student's current school, next school indicator, current grade level, and next grade level.

Type of student	Exit Code for Current Enrollment	Entry Code for New Enrollment	Exit Comment	Replace Existing Values?
Graduating	01 (Graduated from General Education)	N/A	Graduated	☐
Promoted to next school	19 (Continue in District)	R2 (Return from Last Year)	Promoted Next School	☐
Promoted within same school	19 (Continue in District)	R2 (Return from Last Year)	Promote Same School	☐
Retained	19 (Continue in District)	R2 (Return from Last Year)	Retained	☐
Demoted	19 (Continue in District)	R2 (Return from Last Year)	Demoted	☐

Fees: Transfer Method   ⦿ Roll over the current balance ◯ Zero the current balance

⚠ Perform EOY Validation

[Perform End-of-Year Processing]

Fees Transfer Method

Select a fee transfer method:

- Roll over the current balance option - Any student with a non-zero fee balance for the current school year will be given a Start-of-Year (SOY) balance in their fee transactions for the upcoming school year. All individual detailed fee information is no longer available.

- Zero the current balance option – All students will start the upcoming school year with a zero balance in their fee transactions. No fee balance will be carried over from the current school year.

Perform End-of-Year Process Validation

The End-of-Year Process Validation will check each school and each student for End-of-Year readiness. Any validation errors are displayed on screen.

There are two validation options:

- Perform EOY Validation
- Perform EOY Validation and make any students with issues the current selection

Both options will display the same validation error messages. The only difference is that the second option will make any students with validation errors the current selection. The first option will only display the validation error messages without changing any previous selection of students you may have had.

Once the validation option has been selected, click the Perform End-of-Year Processing button.
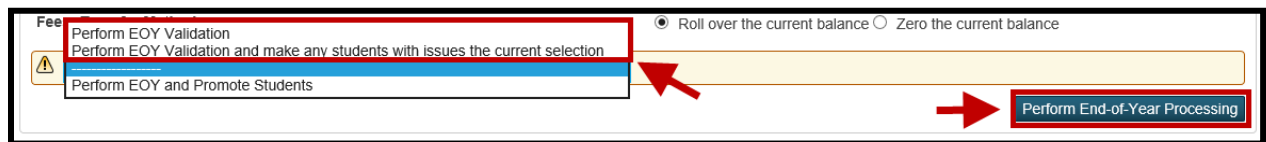
Review and Correct Errors

After running the End-of-Year Process Validation, correct any of the validation error messages that appear.
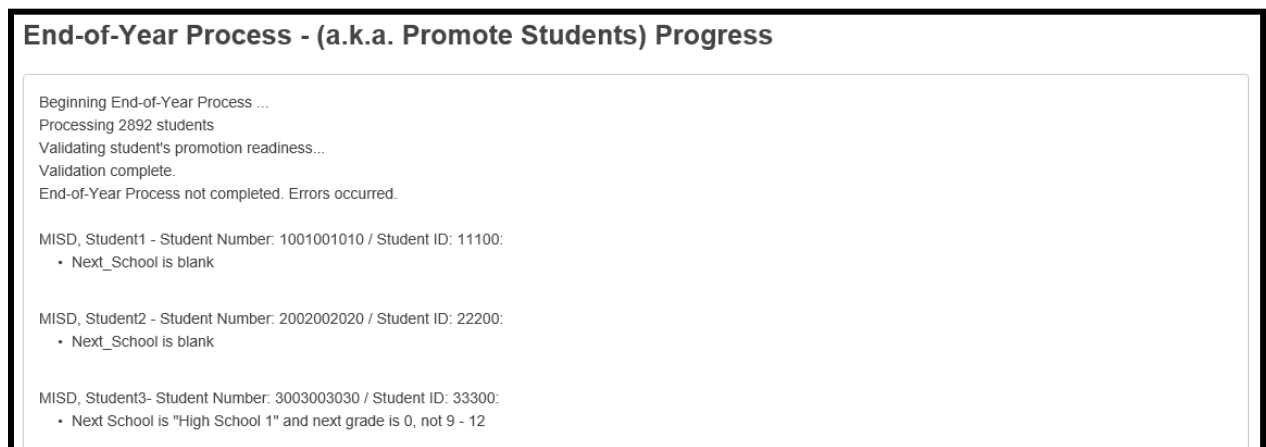
Validation Error Messages

The following error messages may appear when performing the End-of-Year Process Validation. Refer to this section to identify the solution for each error message.

Error Messages and Solutions

Error Message	Solution
Next_School is blank	Assign the student a Next School Indicator on the Scheduling Setup screen.
Next School is "High School" and next grade is 0, not 9-12	If the student is already assigned to the correct Next School, correct the student's Next Year Grade on the Scheduling Setup Screen. If the student is assigned to a correct Next year Grade, you may need to correct the student's Next School Indicator on the Scheduling Setup Screen.
Next_School (123456) is not a valid school in this district. Next School is "High School" and next grade is 12, not 0-0	This issue is caused by an improperly configured Next School Indicator at the student's current school. First, verify that the Next School Indicators at the student's current school are configured with a valid school number at Start Page > School > Next School. Once the Next School Indicators have been corrected at the student's current school, select the student and assign a valid Next School Indicator on the Scheduling Setup screen.
Grade Level is 99 and Next School Indicator is not "Graduated Students"	If the student is supposed to graduate, set the student's Next School Indicator to the Graduated Students School on the Scheduling Setup screen. If the student is not supposed to graduate, then correct the student's Next Year Grade on the Scheduling Setup screen.
School #### is not setup for next year	Select the school that is not setup for next year and create the year term at Start Page > School > Years and Terms

End-of-Year System Preparation

Prior to committing the schedule and running the End-of-Year Process, the following tasks should be completed.

Set Larger Timeout for Admin Users

System > System Settings > Security

Set the option: **Sign Off Administrative Users After This Many Minutes Of Inactivity** to **120** (2 hours).

Disable Teacher Portal, Parent Portal, Student Portals and Mobile Apps

District > Miscellaneous

Place a check in the checkbox for the following options:

- Disable access to teacher portal
- Disable Student and Parent Portals/Mobile Apps

Turn off AutoComm Processes

To avoid the AutoComm processes from interfering with the End-of-Year Process, we recommend disabling the execution of AutoComms.

AutoComms are usually set up at the District level, but may also be school specific and set up at the School level.

To turn the execution of an AutoComm off:

1. Navigate to the AutoComm Setup screen:
   System > AutoComm Setup

2. Select the AutoComm name.

3. Check the box to Turn Execution Off.

4. Click submit. Disable Admin Login Screen

Once you are ready to being the roll over process, you may hide the admin login fields from other users trying to access PowerSchool.

To hide the admin login fields:

1. Navigate to the Hide Admin Login screen:

District > Hide Admin Login

2. Check on the 'Enable Hiding Admin Login Fields' checkbox.

3. Type in a password in the blank text box.
NOTE: Make sure that there are no spaces in the text box and do not use special characters

4. Make note of the additional characters in the URL. You will need to add ?login=[PASS] to the end of the normal district PS URL to access the site until the checkbox is turned off.

5. Press submit at the bottom of the page.

System Requests Performed by the MISD

The following tasks are necessary to secure the system prior to running the End-of-Year Process. The MISD Systems staff handle these tasks. Send requests through email to the helpdesk (help@misd.net) for these to be completed, also come out to the helpdesk and let us know that you sent the helpdesk in case we get busy and don't see it right away.

- **Backup of production PowerSchool server**
  Date and Time required in request

Sample Email:

> *Dear Helpdesk,*
> *Please perform the following tasks so we may complete the End-of-Year Process.*
>
> - *Backup the production server as of:* **MM/DD/YYYY @ HH:MMam/pm**
>
> *Please notify us when we may continue with the End-of-Year Process.*
>
> *Thanks for being the best helpdesk staff ever!*
>
> *Sincerely,*
> *District PowerSchool Liaison*

You must stop here and wait for the OK from the MISD Management Technology Staff before proceeding with the next steps of the End-of-Year Process.
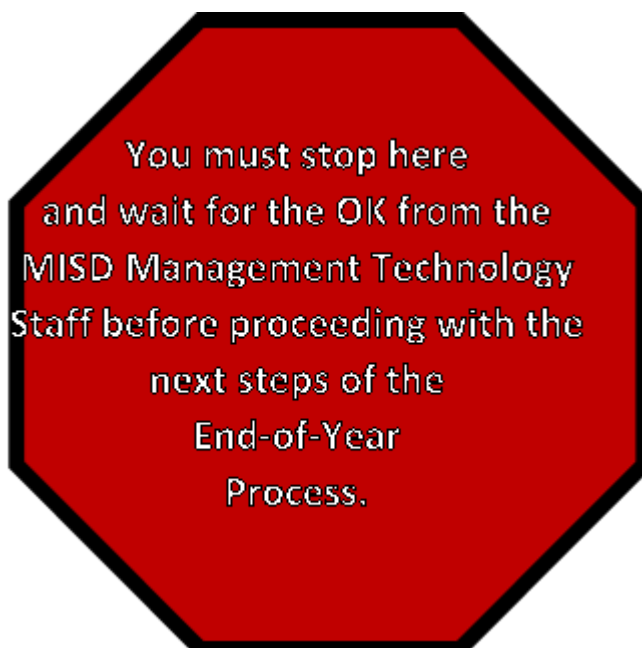
Commit Schedules (Be careful with this portion)

The next year schedule needs to be committed to the live-side for each school using PowerScheduler.

NOTE: Disable the "Commit Button" from scheduling Secretaries.

The below can only be performed at the school level. Go to each school. Make sure to have the year set to 20-21 for the 21-22 school year.

**If you receive Dalx Sync Errors when committing schedules for a building, you will need to commit a second time. Let the first process complete, then perform the commit AGAIN. You will receive a warning when submitting, but the commit will complete. **

Split Year-Long Classes (EX: Year Long (same teacher & same period))

The below can only be performed at the school level.

If applicable, make sure to run the Split Year-Long Classes PowerScheduler function prior to committing schedules.

Start Page > PowerScheduler > Functions > Split Year-Long Classes (once completed, spot check a few students.

Pre-Commit Validation/Verification

- **Years & Terms** – In the next school year on the live side, verify that the term dates are set up correctly in PowerScheduler.
  Start Page > PowerScheduler > Year & Terms > Edit Terms
- **Individual Student Conflict Matrix** – Run this report with a selected grade level of students. Choose the option to filter students by **Only students with unfilled requests**. Look for items in red that need to be fixed.
  Start Page > PowerScheduler > Reports > Individual Student Conflict Matrix
  NOTE: Save the file and send it to the schedulers to fix the errors.
- **Student Schedule List**
  Start Page > PowerScheduler > Reports > Student Schedule List
- **Pre-Commit Validation**
  Start Page > PowerScheduler > Reports > Pre-Commit Validation

Commit Schedules to the Live-Side

1. To commit the schedules, make sure you are in the <u>current school (20-21) year on the live-side</u>.

2. Navigate to:
   Start Page > PowerScheduler > Commit

3. Select which schedules to copy:

   - **Sections Only** – Select this option to commit only sections
   - **Student Schedules Only** – Select this option to commit only student schedules
   - ***Sections & Student Schedules*** *– Select this option to commit both sections and student schedules*

4. Click submit. The Verify Commit Master Schedule page appears.

5. Click submit. The Commit Master Schedule Warnings page displays if there are any conflicts or unavailable courses. If there are no conflicts or unavailable courses, skip to Step 6.
   Note: Only school calendar conflicts are committed as part of the master schedule; unavailable courses are not.

6. If you are certain you want to commit, click submit to proceed. The Changes Recorded page appears.

Note: Once schedules are committed to the live-side, all further scheduling changes must be made MANUALLY on the live-side and not in PowerScheduler.

NOTE: Print the "Progress" page to verify you have committed schedules.

End-of-Year Process

The End-of-Year Process is used to close out the current school year and transfer all students to the grade level and school that each will be attending in the next school year.

The below can only be performed at the district level.

1. To perform the End-of-Year Process, make sure you are in the <u>current school year</u>.

2. Verify End-of-Year Process screen:
   Start Page > System > End-of-Year Process

3. Once the setup has been verified, select the Perform EOY and Promote Students option.

4. Click the Perform End-of-Year Processing button.
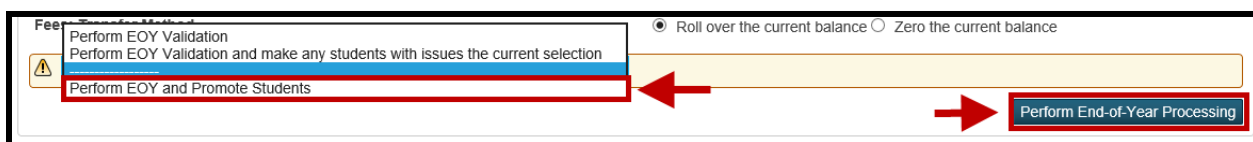
If you have cleared all validation error messages correctly, PowerSchool will begin performing the End-of-Year Process. Depending on the size of your district, the End-of-Year Process may take several hours to complete.

Progress and Completion Message

While the End-of-Year Process is running, it will provide feedback on the progress of the End-of-Year Process. Leave your web browser open to this page while the End-of-Year Process is running. Several messages will be displayed on screen such as:

- Validating student's promotion readiness
- Promoting students and enrolling new students
- Moving balances
- Deleting XXXX records
- End-of-Year Process Complete

The End-of-Year Process is complete once the "End-of-Year Process Complete" message is displayed on screen. This message may not display if the web browser times out.

Note: If the web browser times out or you accidentally close out of the browser window, the End-of-Year Process progress can be monitored in the PowerSchool server log.
(Start Page > System > System Logs > System Log > View current system log file)

Post End-of-Year Process Tasks

After the End-of-Year Process has been completed, there are a number of recommended tasks to perform before starting the school year.

NOTE: Spot check a few students at the elementary, middle, and high school to make sure everything came over properly. For example, contacts, FTE, Demographics, and grade level just to name a few.

NOTE: The EOY Process will automatically rollover your standards, make sure to double-check standards for accuracy.

District and School Administration

The following settings affect student configuration and reporting in PowerSchool. Verify that the following setup areas are still correct and valid for the new school year. Make any changes that are necessary.

Entry and Exit Codes

Start Page > District > Entry Codes (or) Exit Codes

Use entry codes to identify reasons why students enroll in and transfer to your school. Use exit codes to identify the reasons why students leave your school.

School Information

Start Page > District > Schools/School Info

Review and update the information for each school in your district, including the school's address, contact information, school administration information, etc.

Default Term Level

Start Page > School > Miscellaneous
Start Page > District > Miscellaneous

This setting determines the level displayed by default at the top of the page when in PowerSchool.

Default Term When Between School Years

Start Page > District > Miscellaneous

This setting should be set to Previous School Year to disallow the students/parents to see the New Year's schedule. You would need to remember to set this to Closest School Year or Next School Year when you are ready for the schedules to be seen.

Bell Schedule

NOTE: Verify with all schools of any changes.

Start Page > School > Bell Schedules

Review each bell schedule for the following items:
- Verify that the bell schedules for each school contain the correct number of periods and are associated to the correct attendance conversion method.
- Only one bell schedule can be used per calendar day and the bell schedule determines which attendance conversion is used on a given day.
- Verify that each period in each bell schedule has the correct start time, end time, and is set to count in (or to be excluded from) ADA calculations.
- For meeting attendance, each period that counts in attendance should be checked for ADA.

Calendar Setup

NOTE: Do NOT set up the school calendar for any buildings that will be using the Copy Master Schedule function. The Copy Master Schedule function will reset any calendar work you do prior to running that function for those buildings. Set up the calendar after you do the Copy Master Schedule function.

Verify that each day in your school calendar is properly configured with the correct day, bell schedule, in-session indicator, membership value, and type.
(Start Page > School > Calendar Setup)

The Automated Calendar Setup function can be used to mass fill the above information.
(Start Page > School > Automated Calendar Setup) – **SEE SEPARATE HANDOUTS to complete this process.**

The District Calendars function can be used to create one or more calendar templates which can be pushed to one or more schools.
(Start Page > District > District Calendars)

Early Warning System

Start Page > School > Early Warning Setup

Update any Early Warning System Setup parameters that may have changed from the previous school year.

Scheduling

The following settings affect the scheduling of both school and course enrollments for students in PowerSchool. Verify that the following setup areas are still correct and valid for the new school year. Make any changes that are necessary.

Scheduling Security

Start Page > System > Groups

After the End-of-Year Process has been completed, **it is recommended to lockout schedulers from PowerScheduler (Administrators, Counselors, Schedulers, and Secretaries) as all schedule modifications must be done on the live-side.** To do this, remove the checkmark from the PowerScheduler Access checkbox on the Edit Group page.

It is also recommended to update the school year that the schedulers are allowed to modify. To do this, select the new school year from the Can Modify Schedules drop-down menu on the Edit Group page.

Copy Master Schedule (Live Side)

This process is usually used for Elementary Buildings.

NOTE: If a district is using PowerScheduler for SECONDARY BUILDINGS, they do not have to run this.

Start Page > System > Copy Master Schedule

Use the Copy Master Schedule function to copy schedules from a previous school year. This function copies sections with all associated settings, such as term, expression, teacher, room, department, etc.

1. Select the Source Year (The school year from which you want to copy)

2. Select the Target Year (The school year to which you want to copy)

3. Decide whether or not to clear existing scheduling terms in the destination school year. Leave unchecked if you want the system to attempt to match the source and destination terms. If no matches are found, the source terms are added to the destination year. If checked, this function will copy the source terms to the destination year.

   NOTE: Sections that will be using PowerTeacher Pro that were PowerTeacher Gradebook sections in the current school year will need to be modified on a section-by-section basis or with a mass change through DDA. Refer to the "Switching Gradebook Type from PowerTeacher Gradebook to PowerTeacher Pro" document. If you need assistance, please contact the helpdesk.

   NOTE: If all sections are to be using PowerTeacher Pro, make sure the Default Gradebook Type is set to PowerTeacher Pro in the PowerTeacher Pro Settings area in District Setup.

Periods (Do for every school)

Start Page > School > Periods

Verify the number of periods and the period abbreviations for the new school year.

To adjust the number of periods in a given school year:
1. Navigate to:
   Start Page > School > Years & Terms

2. Click the Year name to modify for the selected year.

3. Select the number of periods from the Periods drop-down menu.

4. Click submit.

Days (Do for every school)

Start Page > School > Days

Verify the number of days and the day abbreviations for the new school year.

To adjust the number of days in a given school year:
1. Navigate to:
   Start Page > School > Years & Terms

2. Click the Year name to modify for the selected year.

3. Select the number of days from the Days drop-down menu.

4. Click submit.

Reset Class Counts (Do for every school and throughout the summer)

Start Page > Reset Class Count
Start Page > System > Special Operations > Reset Class Counts

The Reset Class Counts function should be run to make sure that section enrollment numbers appear correctly on the Teacher Schedules. This function should be run after the school calendar has been set up.

Years and Terms

Start Page > School > Years & Terms
Start Page > District > Years & Terms

Verify Start and End Dates

Verify the start and end dates of the scheduling terms. Schedule terms define dates for scheduling students into school and sections/classes. Also, make sure the Import File Term # is filled out.

Michigan TSDL Store Code

Within each scheduling term, set the Michigan TSDL Store Code.

Hide Schedules for the Next School Year

In order to hide student schedules from appearing in the Parent Portal as well as in Unified Classroom, the **Suppress Classes For This Term From Parent/Student Users** checkbox must be checked for **each** scheduling term you do not want to appear.

NOTE: In PowerSource > PowerSchool Insider > Episode 65 (1:02:30) – Indicates that this now covers the mobile app and the UC environment.

It is suggested to suppress all terms in mass through DDA to minimize the time that schedules may show for the next school.

Start Page > School > Years & Terms (Scheduling Years & Terms – NOT Reporting Years & Terms)

Edit Term

Field	Value
Name of Term	2020-2021
Abbreviation	20-21 (example: 00-01)
First Day of Term	09/08/2020
Last Day of Term	06/28/2021
What portion of the school year does this term represent?	Full year
Suppress Classes For This Term From Parent/Student Users	☑
Import File Term #	3000
	3000
Michigan TSDL store code (ex: S1)	

Submit

1. Navigate to DDA
2. Change the Current Table to: Terms
3. In the first search box: [ID] >= [3000]
4. Click the Search all XXXX records in this table button
5. Click Modify Records
6. From the drop-down menu set: [SuppressPublicView] = 1
7. Click the Modify Selected Records button

Attendance

The following settings affect the calculation of attendance and membership in PowerSchool. Verify that the following setup areas are still correct and valid for the new school year. Make any changes that are necessary.

Attendance Codes

Start Page > School > Attendance Codes

Review the Attendance Codes setup for the new school year. Ensure that the proper codes are designated as presences and absences and are properly counted in ADA.

Attendance Code Categories

Start Page > School > Attendance Code Categories

Verify that the correct Attendance Code Categories are set up for the new school year. The schools must use the Excused, Unexcused, and Tardy attendance code categories and shouldn't change or delete these (because they may have been used in previous school years). Attendance codes must be associated with the tardy attendance code category in order to be properly recognized as a tardy.

Full-Time Equivalencies

Start Page > School > Full-Time Equivalencies (FTE)

FTEs are used for reporting on ADA/ADM and to indicate what portion of a school day students attend (full-time and half-time students). Ensure that each FTE has a default attendance mode and has a **default** attendance conversion method. **Note: You cannot have two defined FTEs in a different name.**

Attendance Conversions

Start Page > School > Attendance Conversions

Verify that each attendance conversion is correctly defined for each full-time equivalency.

Attendance Preferences

Start Page > School > Preferences

Verify that the attendance preferences are correctly set up for each school in your district.

Grading

The following settings affect the calculation and display of current and historical grades in PowerSchool. Verify that the following setup areas are still correct and valid for the new school year. Make any changes that are necessary.

GPA Calculations

Start Page > District > GPA Calculations

Update any GPA Calculations that are set up with year specific query options and make any other necessary changes.

Final Grade Reporting Term Setup/Copy Final Grade Setup

Start Page > School > Final Grade Setup
Start Page > System > Copy Final Grade Setups

Use Final Grades Setup to view and set up your school's grading terms and their parameters. Define the dates of each grading term in the school year and assignment names for which teachers enter final grades for that terms.

A Copy Final Grade Setups function is available to copy the final grade setups from one building to another. The final grade setups must be set up in one building prior to copying to another. Once created in the first building, switch to the building that is not set up and use the copy final grade setups function. Only use this function to copy final grade setups for buildings that will have the same final grade setup structure. (Elementary building to Elementary building, etc.)

Current Grade Display
(Note: This needs to be changed to the current term throughout the school year.)

Start Page > School > Current Grade Display

Use Current Grade Display to set up or change how the system displays a student's grade and attendance information on the Quick Lookup page in PowerSchool and the Current Grades and Attendance page that parents use in PowerSchool Student and Parent Portal.

GPA Student Screens

Start Page > School > GPA Student Screens

Use the GPA Student Screens function to determine what appears on GPA-related student pages, including the Quick Lookup page and the Cumulative Information page. Update any GPA Calculations that are setup with year specific query options and make any other necessary changes.

Honor Roll

Start Page > School > Honor Roll

Configure honor roll methods and levels at each school. The grades included in the honor roll calculations are based on the associated GPA calculations set up at the District Office.

Review the GPA Calculation associated with each honor roll level and ensure that the calculation is configured properly for the current school year.

Class Rank

Start Page > School > Class Rank

Review each class rank method and ensure each is associated to the correct GPA calculation method.

Student Information

The following settings affect several reports and functions throughout PowerSchool. Verify that the following setup areas are still correct and valid for the new school year. Make any changes that are necessary.

Full-Time Equivalency (District Office)

Search for students without a Full-Time Equivalency. If any students are returned, update their current school enrollment on their Transfer Info student screen with an FTE. Students without an FTE will cause invalid ADA calculations.

1. Perform the following search on the Start Page:
   FTEID=

2. If PowerSchool returns one or more students, update each student record and assign the student an appropriate FTE on the Transfer Info student screen.

School Enrollments (School Level)

Start Page > System Reports > School Enrollment Audit

Run the School Enrollment Audit report to identify any invalid school enrollments. School enrollments may be updated on the Transfer Info student screen.

System Administration and Security

Verify that the following setup areas are still correct and valid for the new school year. Make any changes that are necessary.

Turn on AutoComm Processes

Turn on any AutoComm processes that may have been turned off prior to the End-of-Year Process.

AutoComms are usually set up at the District level, but may also be school specific and set up at the School level.

To turn the execution of an AutoComm on:

1. Navigate to the AutoComm Setup screen:
   System > AutoComm Setup

2. Select the AutoComm name.

3. Uncheck the Turn Execution Off checkbox.

4. Click submit.

Set Shorter Timeout for Admin Users

System > System Settings > Security

Set the option: **Sign Off Administrative Users After This Many Minutes Of Inactivity** to a shorter amount of time (district decision).

Sandbox Data

Please send a message to the Helpdesk (**help@misd.net**) with your preference on what should happen with your sandbox:

- Leave current sandbox data as is
- Load data from the backup taken just prior to rollover
- Load current live data (post rollover)

After your production environment is open to the outside, we will place your sandbox in the queue to be upgraded to match the version of your production environment.

PowerSchool Special Education (TIEnet)

Upon completion of the EOY rollover, an email needs to be sent to Leslie Budnick (lbudnick@misd.net) letting her know that your district rollover is complete so that she can synchronize the programs and services for the new school year.

Enabled Admin Login Screen

Once you are ready to let other admin users back into the SIS, you'll need to re-enable the admin login screen.

To enable the admin login fields:

1. Navigate to the Hide Admin Login screen:
   District > Hide Admin Login

2. Un-check the 'Enable Hiding Admin Login Fields' checkbox.

3. Press submit at the bottom of the page.

End-of-Year Process Checklist

End-of-Year Data Preparation Checklist

Process	School Buildings								
Validate Enrollment Dates									
Section Enrollment Audit									
School Enrollment Audit									
Scheduling Setup Screen									
Clear Scheduling Setup Screen for Inactive Students									
Next Year Grade/Next School Indicator									
List Students Function									
EOY Grade and School Checker Report									
Roll Over Errors Report									
Archive Data/Reports									
Print Reports/Export Data									
5-Year Follow-Up Survey Data									
Years and Terms									
Create/Verify New School Year									
Activities									
Clear Activities									
Full-Time Equivalencies									
Set up Full-Time Equivalencies									
Fees									
Printing Fees Invoice									
List Students/Export of Student Fee Balance									
Transfer Info and Graduation Information									
Create/Update/Import Export File									
Populate Class Rank and GPA Fields									
Transcript Attendance									
Import Transcript Attendance Data									

End-of-Year Process Validation Checklist

Process	School Buildings								
Setup End-of-Year Process Screen									
Validate High Grade and Default Next School									
Exit Code for Current Enrollments									
Entry Code for New Enrollments									
Exit Comments									
Fee Transfer Method									
Perform End-of-Year Process Validation									
Review and Correct Validation Error Messages									

End-of-Year Process System Preparation Checklist

Process	School Buildings								
System Preparation									
Set Larger Timeout for Admin Users									
Disable Teacher and Parent Portals									
Turn off AutoComm Processes									
System Requests Performed by the MISD									

Commit Schedules Checklist

Process	School Buildings								
Commit Schedules Process									
Split Year-Long Classes									
Pre-Commit Validation/Verification									
Commit Schedules to the Live-Side									

End-of-Year Process Checklist

Process	School Buildings								
End-of-Year Process									
Verify End-of-Year Process Screen Setup									
Run End-of-Year Process									

Post End-of-Year Process Checklist

Process	School Buildings								
District and School Administration									
Entry and Exit Codes									
School Information									
Default Term Level									
Default Term When Between School Years									
Bell Schedule									
Calendar Setup									
Early Warning System									
Scheduling									
Scheduling Security									
Copy Master Schedule (Live Side)									
Periods									
Days									
Reset Class Counts									
Years and Terms									
Verify Start and End Dates									
Michigan TSDL Store Code									
Hide Schedules for Next School Year									
Attendance									
Attendance Codes									
Attendance Code Categories									
Full-Time Equivalencies									
Attendance Conversions									
Attendance Preferences									

Process	School Buildings								

Grading									
GPA Calculations									
Final Grade Setups									
Current Grade Display									
GPA Student Screens									
Honor Roll									
Class Rank									
Student Information									
Full-Time Equivalency									
School Enrollments									
System Administration and Security									
Turn on AutoComm Processes									
Set Shorter Timeout for Admin Users									
Allow Users Back In & Sandbox Data									
PowerSchool Special Education - Email Leslie Budnick									