End of Year Guide 2022

This guide provides resources to aid you in preparing for and carrying out all required end of year processing for your Ascendance applications. Please consult ALL sections that apply to your school prior to performing any end of year processing!

End of Year Process - Getting Started

This document is intended to assist you with your end-of-academic-year/end-of-fiscal-year processing. We have included some answers to frequently asked questions, an overall task sequence, checklists of required and suggested tasks, and some next steps to adjust your data setup for the new academic and fiscal year. Please read all applicable sections carefully **before** beginning your end-of-year process.

Who should be involved in End of Year processing?

Because end of year processing touches many areas of your system, this needs to be a coordinated effort between different departments in your school! This is not just a task for your System Administrator--the people performing the various tasks need to be people who understand how the data is set up and how it is used in your operations.

What is the basic sequence of steps?

Each of these steps is covered in more detail as part of this guide. You'll need to completely finish each step before moving on to the next.

1. Coordinate and plan	Assign a "point" person from each area where you use Senior Systems Ascendance applications: your **Business Office**, your **Academic/Registrar's Office**, your **Advancement Office**, and your **IT Department**. (*We recommend designating an End of Year project manager to assign and coordinate with the "point" person from each area.*) Meet and use this guide to plan and schedule the necessary activities. See Task 1 - Coordinate and Plan.
2. Prepare systems and data	All departments can be doing this more or less simultaneously. Depending on the specific application, this may include checking or updating certain types of data, posting batches, and/or running reports. We provide separate checklists for each department. See Task 2 - Prepare Systems and Data.

3. BACK UP your data	**Back up your database!** Self-hosted customers will schedule this with their IT department. **Ascendance Cloud Schools**: You **must contact Senior Systems Product Support** to have us take a special backup copy of your database before proceeding. Please email us at seniorsystems-support@communitybrands.com at least **24 hours in advance** of when you will be performing your end of year update. We will save the previous night's backup as your end of year backup copy. We are not able to take individual database backups during the business day. Please note that only 1 end of year backup of your database is allowed per year. We cannot do incremental backups for a given year. See Task 3 - Data Backup.
4. Run End of Year for each application	This is similar to running regular end of period processing, but there can be additional steps, and it may take significantly longer to run. You will need to proceed through the Ascendance applications in a specific sequence, and we provide separate checklists for each department. See Task 4 - Run End of Year.
5. Run Student Grade Update	This function must be run by a system administrator (you must be logged in with Super User credentials), to promote all students to their Next Grade and to create new constituent records, if applicable. However, the person running Student Grade Update will need information from the other departments to complete the process. See Task 5 - Run Student Grade Update.
6. Next steps - adjust data setup for the new year	After end of year processing is complete, you need to make some changes to your data setup to recognize the new school year/fiscal year, and ensure that operations going forward are recorded correctly. See Task 6 - Next Steps.

FAQ

Do we need to wait until ALL data entry for the year is complete?

For academic data, **YES**, you MUST complete data entry and reporting for grades, comments, and attendance before running end of year.

For financial data, **NO**, you can still perform entry and posting of transactions for the previous fiscal year as long as your GL setup allows it, and you can always run reports for a previous fiscal year, so you do not need to wait.

Do some applications have a different end of year?

Yes, some applications may perform end of year activities on their own schedules. Please refer to the appropriate reference manuals for more details about these end of year procedures:

- The **Accounts Payable** application also has an end-of-calendar-year process related to the creation of 1099 forms for vendors.
- The **Admissions**, **Financial Aid**, **Enrollment Management**, and **Radius AE** applications do not have a firmly defined end of year, since each school's admissions and enrollment season will vary somewhat, but there are certain tasks that you will want to perform before starting a new year or season. Also, if you use **Online Admissions** and/or **Online Enrollment** for My BackPack or Radius AE, there are some additional tasks required to set up for a new season or year.
- In a similar fashion, the **Placement** application does not have a firmly defined end of year, but you will want to set up or clear certain data prior to the start of a new college application season.
- The **Summer School/Extended Programs** application does not have a single end of year, since programs may run at all times of the year and may overlap with each other, however, there are some annual or seasonal tasks that you will want to perform separately for each division. Also, if you use **Online Summer/Program Registration** for My BackPack, there are some additional tasks required to set up registration for a new season or year.

Task 1: Coordinate and Plan

Due to the integrated nature of the Senior Systems Ascendance applications, all affected departments need to coordinate and plan their end of year activities to ensure a smooth process, for schools that use the entire suite of applications, this includes the Business Office, the Alumni/Development or Advancement Office, and the Academic or Registrar's Office, as well as the IT department or system administrator.

Use this guide to determine which tasks you will need to perform and who will do them. Read through **ALL** of the procedures to make yourself aware of points in the process where coordination is particularly important. In particular, during the Student Grade Update process, the person performing the update will need to make choices about clearing certain types of data, and will need to select the correct relationships and constituencies to ensure that graduates are set up properly in Alumni/Development. Make sure that the people who are responsible for the data are involved in providing the data needed to complete those steps.

What's Next

After you have made a plan and involved people from each department, you are ready to proceed to Task 2: Prepare Systems and Data.

Task 2: Prepare Systems and Data

Once you have completed Task 1: Coordinate and Plan, you are ready to prepare your systems and data for end of year.

In general, all departments can be working on their preparation tasks simultaneously. Be sure to review the End of Period Update chapter in the Reference Guide for each Ascendance application, so that you understand what processing will take place. Many of the preparation tasks involve completing data entry, posting batches, printing reports, and checking to be sure that key data fields are set properly.

Best Practice: When running reports in preparation for end of year, we highly recommend that you save electronic PDF copies so that you will have detailed, re-printable records of any data that is to be consolidated or removed.

The following checklists will help you to ensure that all systems and data are ready for end of year:

Business Office Checklist - Preparation Steps

Alumni/Development Checklist - Preparation Steps

Academic Office Checklist - Preparation Steps

What's Next

After you have completed all the preparation steps for Business Office, Alumni/Development, and Academic Office/Registrar, you are ready to proceed to Task 3:Data Backup.

Business Office Checklist - Preparation Steps

Note:

*Recommended tasks are listed in black

***Required tasks are listed in red**

Important :

Before you begin the Preparation steps, it is important to create an End of Year folder in which to store all of the End of Year reports that are generated. These reports are critical for future reference and auditing purposes. *Failure to archive may result in a cost being incurred for retrieval of archived data.*

Campus Store

- ☐ **Perform the End of Day Update. IMPORTANT: Do NOT allow any further transactions for Campus Store until End of Year Processing is complete.**
- ☐ Preview the Inventory Value Report. Save as PDF and/or Export the data. **True End of Year Values cannot be recreated after end of period processing**.
- ☐ Preview the Category Sales Analysis Report for all categories. Save as PDF and/or Export the data. **True End of Year Sales data cannot be recreated after end of period processing**.

Accounts Receivable

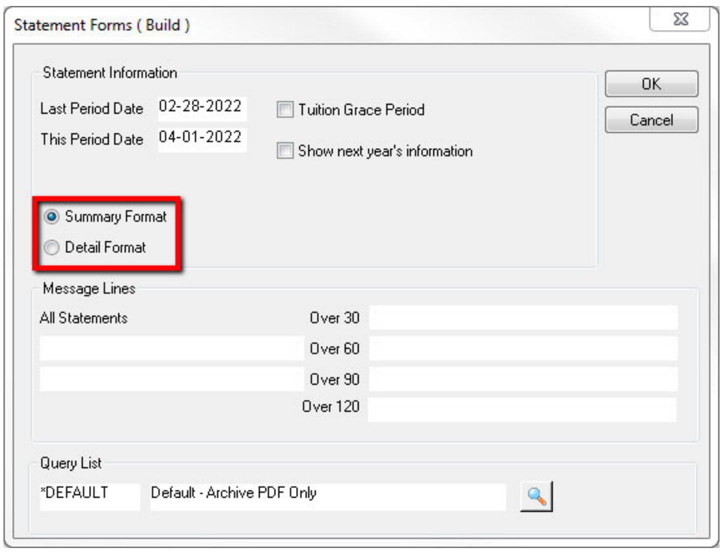
- ☐ Post any pending Summer School batches that need to be in this Fiscal Year. Post one summer division at a time for better reporting.
- ☐ Post any pending Campus Store batches one location at a time (after completing Campus store End of Day, as noted above).
- ☐ Post any pending batches that need to be included in this Fiscal Year.
- ☐ Check your Enrollment Deposit and Other Enrollment Deposit buckets for balances for This Year. At this point in the year, there should not be anything in these buckets. Deposits for Next Year should be in the Next Year Enrollment Deposit and the Next Year Other Enrollment Deposit buckets. During the Student Grade Update process, amounts in Next Year buckets will be **ADDED** to any amounts left in the This Year buckets.
- ☐ Run a Student List Report for current students. Save as PDF and/or Export the data.
- ☐ Run an Aged Trial Balance Report. Save as PDF and/or Export the data. If you have posted deferred billing, you may want to run Current/Deferred Balance Report as well. **True End of Year Values cannot be recreated after end of period processing**.

☐ Run a Prepaid Balance Report. Save as PDF and/or Export the data. **True End of Year Values cannot be recreated after end of period processing**.

☐ Run a Deposit Balance Report. (Be sure to check the 'Show Next Year' checkbox). Save as PDF and/or Export the data. **True End of Year Values cannot be recreated after end of period processing.**

☐ **For schools with detailed STATEMENTS, you MUST build and update statements.**

How to determine if you have detailed statements: If you see the **Detail Format** and **Summary Format** option buttons when building statements, then your school has detailed statements.



Accounts Payable

☐ Post any pending batches for the current fiscal year to General Ledger, if needed.

☐ Print the Vendor Unpaid Invoices Report and/or a Projected Cash Requirements Report. Save as PDF and/or Export the data. **True End of Year Values cannot be recreated after end of period processing**.

☐ Print the Open Purchase Order List/save to PDF. If you have any outstanding purchase orders that you want to carry over into the new fiscal year, you MUST edit each one and mark it for *Next Year*. **All purchase orders not marked for next year will be CLOSED during end of year processing.**

☐ If you plan to delete vendor paid history during the end of year processing, print the Vendor History report/save to PDF for the date range to be deleted.

☐ If you plan to delete cash disbursement data during the end of year processing, print the Check Register report/save to PDF for the date range to be deleted.

Student Loans

☐ Post any pending batches for the current fiscal year to General Ledger, if needed.

Alumni/Development

☐ Post any pending transmittal batches for the current fiscal year to General Ledger, if needed.

General Ledger

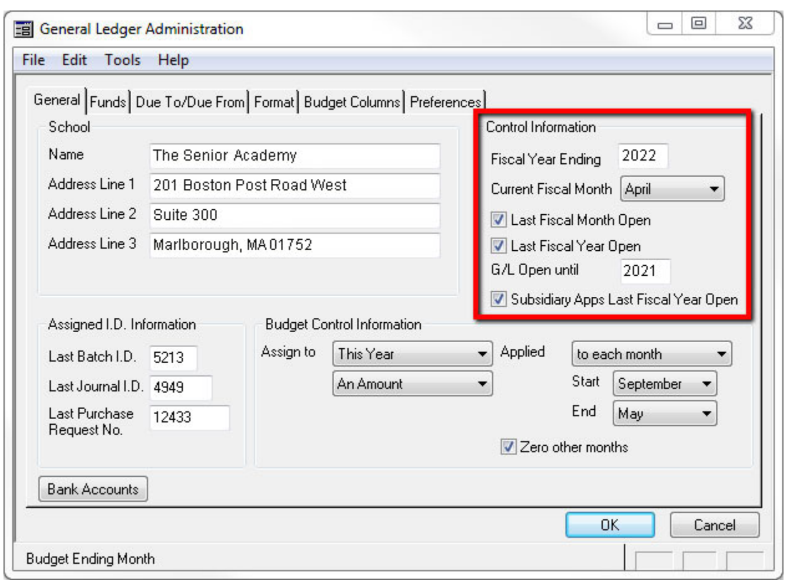
☐ Post any pending batches that need to be included in this Fiscal Year.

☐ **Data check:** in Sub-ledger Maintenance, if the 'Balances clear at end of the year' checkbox is NOT checked, then balances WILL carry forward into the new year.

☐ **Data check:** go to **Maintenance > Administration Maintenance** and verify that each fund is referencing the correct surplus account; all *Revenue*, *Expense*, *Gift Received* and *Transfer* type accounts will have their balances closed out to the surplus accounts.

☐ If you want to be able to delete temporary vendors during Accounts Payable End of Period Update, use the Bank Reconciliation feature in General Ledger to reconcile outstanding checks, credits, debits, and other transactions from your bank statement. Any vendors who have paid history records that have not been *Cleared* through Bank Reconciliation will NOT be deleted.

☐ You can continue to post batches back to the previous fiscal year as needed to complete data entry and make adjustments. If you want to do this, make sure your General Ledger Administration Maintenance settings are configured to allow it:

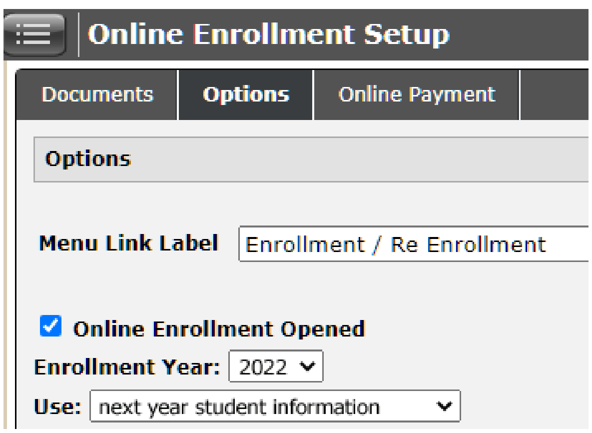


☐ **IMPORTANT:** For any new students for the upcoming year that you transfer in from this point forward, you will need to manually edit their 'Next Year' information to make sure it is set correctly. Otherwise, these students will not advance correctly when you perform Student Grade Update next year!

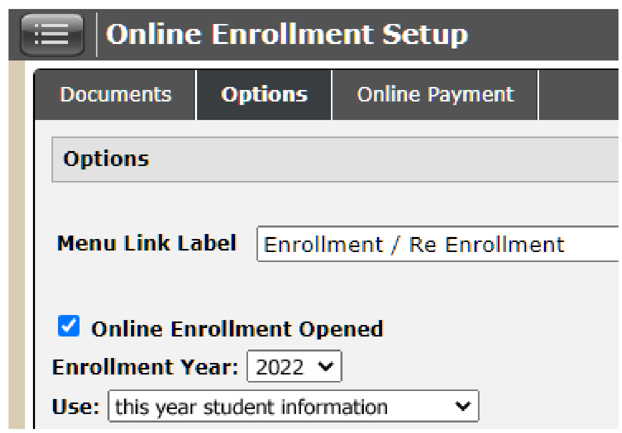
☐ Business Office personnel should check your **Accounts Receivable** > **My BackPack** > **Configuration**, to adjust labels and customized text to reflect the new school year (e.g. '2021-2022' should become '2022-2023'), to reset dates for display of statements and/or campus store transactions that parents can view, and, if appropriate, turn off display of 'Next Year Deposits' and set it to 'Current Year Deposits' or none at all. Be sure to test the My BackPack interface from a test parent account to verify that all pages display as you would expect.

☐ For schools that use Online Enrollment/Re-Enrollment, if your online enrollment process is still open for the upcoming school year, you will need to change the option for the student data to use from 'next year student information' to 'this year student information', so that online enrollment contracts and transactions are applied to the correct school year. This option is set in My BackPack, using the Online Enrollment Setup function, on the **Options** tab.

Before



After



Alumni/Development Checklist - Preparation Steps

Note:

***Important:** If your school posts Pledges to the General Ledger it is required to run Pledge Projection and Pledge Projection by Fund.*

Run this on the day you are rolling to the new fiscal year as this is the latest pledge information for projected amounts due. Once fiscal year is moved to the new year, you can't get this information for the previous year easily.

***Important**: Due to system changes after end of year, you should run Parent Giving Analysis by Grade and Giving Level Detail Report as constituencies will change and giving levels revert to 0 at the beginning of the new fiscal year.*

Important : Please read this section thoroughly before proceeding!

The Student Grade update has important Alumni selections that you communicate to the person running the student grade update your Alumni choices. We recommend the Alumni member to sit with the individual while they are performing the Student Grade Update. Alumni has global changes and relationship info that needs to feed into the Alumni application accurately for graduates, linked parents and grandparents.

BEFORE STUDENT GRADE UPDATE

- ☐ **END OF YEAR FOLDER.** Create End Of Year folder in the Template Manager so you can have all your reports saved there for future years.
- ☐ **TRANSMITTALS.** If your school posts to General Ledger, process any pending transmittals that need to be sent to General Ledger before end of year.
- ☐ **CONSTITUENT ATTRIBUTES.** It is advised to verify all your current parents have the current parent attribute. This helps when identifying historical giving for current parents.
- ☐ **REPORTS/COUNTS.** that are applicable to NAIS/DASL numbers (Annual Fund Report / Giving Summary by Constituency Report / Detail and in Hierarchy). Custom Export that exports giving, constituencies, mailing filters, lost deceased -- sounds like a lot, but it is very helpful for POST end of year information that you will need.

AFTER STUDENT GRADE UPDATE

☐ **NEW FAMILIES FUNCTION.** If you are concerned about duplicate records generating (tends to happen to your data every year), call us and we can walk you through a report we have that identifies potential duplicates PRIOR to running the new family's function. When you know your admissions side is linking to your Alumni and Faculty records as parent records, proceed to transfer in the New Families after end of year is completed.

☐ **CONSTITUENT ATTRIBUTE CURRENT/NEW PARENTS.** Once New Families and Withdrawn families are generated after end of year, it is time to globally insert the current parent constituent attribute for the new families you just brought in. NOTE: Add manually throughout the year for midyear new families.

☐ **NEW FAMILIES TO THE SCHOOL.** Have your Registrar give you the first-time families (no other sibling has ever been to the school). You can insert a constituent attribute of New Parent 2023. Then in the future you can query easily on when someone was a new family.

☐ **STUDENT CONSTITUENT RECORDS.** If the child graduates that year use the global constituency update function to update them to Alumni constituencies (constituency = current student and class year = this year). Click on the Globe icon for the constituency update function.

☐ **WITHDRAWN FAMILIES.** Process Withdrawn Families after end of year. Clear out your notifications. Doing this after end of year gives accurate constituent counts.

☐ **Template Manager.** With the new fiscal year brings template updating (make generic if you can so they roll year-to-year and rename titles to reflect new fiscal year). When done click SAVE TEMPLATE located under File at top left of window.

☐ **Queries.** Update any year specific queries to the new fiscal year or try to make as generic as possible.

☐ **Faculty Records.** Need to manually add new faculty constituents –they are not auto populated.

☐ **Faculty that have left.** Change constituency to past faculty if they left and fill in constituency TO date if you use that also.

☐ **FAMILY ID linking review.** Make sure all your current parents have a family ID. (grandparents too if they carry across modules). On the constituent search screen add the family ID filter and run a query for current parents and grandparents. Filter the column with the family ID to see if there are unlinked ones that straggled and need to be linked.

☐ **SALUTATION REVIEW FOR NEW YEAR.** On the constituent search screen you can also add all the combined salutation formats to be viewable and the mailing name. Export the list or review combined salutation 1, 2, and 3 for consistency. Do some not have the correct format? You can edit and fix individually if needed. This is where you verify the deceased person is out of mailing name and combined salutations. If you see, fix and check additional salutations too and fix. May have been overlooked when marking deceased on INFO tab.

☐ **Inactivating Constituents.** You may have constituents that you desire no longer to be active. You can uncheck the active constituent check box on the info tab. Please note, you can still choose to select them in reports, exports and mailings

☐ **SEND MAIL FLAG.** This is to make sure your mailings run accurately. Sometimes you will have sent mail checked, but no address is there. Run a query in the constituent search screen that says address line 1 is blank and send mail is checked. If you find these, uncheck send mail.

Academic Office Checklist - Preparation Steps

You will need to do these preparation steps separately for each academic division.

Note:

*Recommended tasks are listed in black

***Required tasks are listed in red**

Important :

Before you begin the Preparation steps, it is important to create an End of Year folder in which to store all of the End of Year reports that are generated. These reports are critical for future reference and auditing purposes.

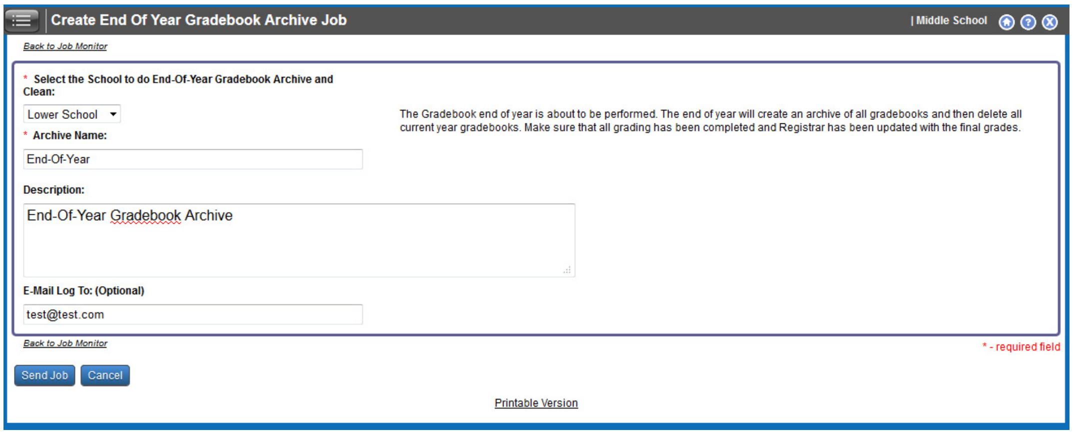
Dean's Office

- ☐ **Make sure that all current year attendance data has been entered.** You will not be able to enter detailed attendance data for past years.
- ☐ **Print detailed attendance reports/save to PDF** for all students. Running the final End of Period Update in Registrar summarizes all daily and class attendance data for each student, moves it into Academic History, and then deletes it, so **Attendance reports cannot be printed after end of period processing** is completed.

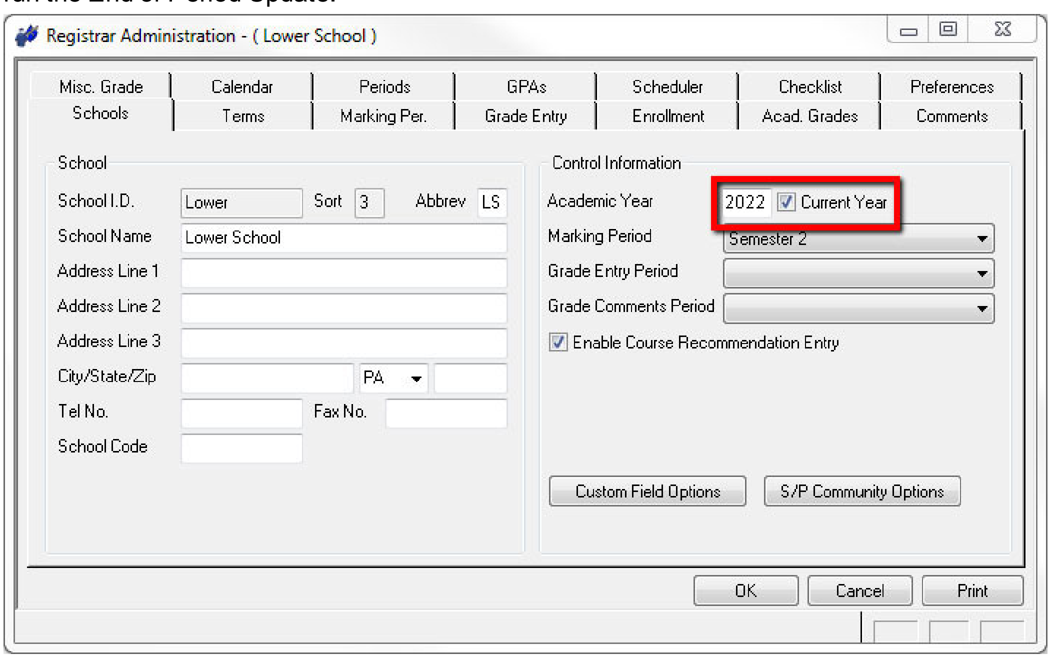
Registrar

- ☐ **Make sure that all grades have been entered and report cards have been printed/saved to PDF and/or archived. Verify next year grades and student groups.** Running the final End of Period Update removes all grades and schedules for each student and moves the information to Academic History. **New report cards cannot be printed, archived or published to My BackPack after end of period processing** is completed.
- ☐ Print the Student List report.
- ☐ **Print all final grade and schedule reports/save to PDF**, including Interim reports, Progress reports, Mid-Term reports, GPA List reports, Honor Roll reports, Ranking reports, and any current year Grading or Schedule reports. Running the final End of Period Update removes all grades and schedules for each student and moves the information to Academic History. **No current year grade or schedule reports can be printed after end of period processing** is completed.
- ☐ **If you use Daily Gradebook for My BackPack, create an end of year gradebook archive by clicking the Grading Job Process Monitor option or Jobs option in the Grading Setup/Tasks area of My BackPack and select the Create End Of Year Gradebook Archive task in the New Job**

to: drop-down menu. This must be done for each division that uses gradebooks. This is a special type of gradebook archive--it is NOT the same as the regular gradebook archive function, and it must be run by someone who has security access to the Jobs function in the Admin Community. This step creates an archive of the current year's gradebooks and then deletes the originals. The archive copies are read-only, and can therefore only be accessed for reference. Teachers may also want to print hard copies of their grade-books before this task is performed.



☐ Data check: use **Registrar > Maintenance > Administration Maintenance** for each division to verify that the current academic year is 2022. Your current Academic Year should not be 2023 until after you have run the End of Period Update.



- [Data check to use Reports | Student Worksheet to verify that next year grades are set properly.]

Most Popular Reports to Archive:

Registrar

Student List
Student List by Advisor
Homeroom List
Student Schedules (ie. Schedule Cards)
Student Grade Reports
Grade/Comments by Section
Grade Distribution Report (Letter & Number)
Student Grade List
Any Other Report you think is important.

Class Ranking
Course Lists/ Reports
GPA List
Master Schedule List
Master Schedule By Day List
Class Roster
Emergency Contact list
Any Custom Reports

Dean's Office

Daily Attendance History by Student (set dates for the full year)
Class Attendance History by Student (set dates for the full year)
Discipline History by Student (set dates for the full year)
Any Other Report you think is important.

Enrollment Management

Although Enrollment Management is not impacted by End of Year it is good practice to export your current history to the EOY folder for a snapshot of the season. Include all posting fields and date fields.

Task 3: Data Backup

Once you have completed Task 2: Prepare Systems and Data, you need to **STOP** and back up your data before proceeding!

Self-Hosted Schools: You will need to schedule a complete back up of your database with your IT department. Make sure that a restorable backup media copy is saved and not overwritten for several months (or at least until your audit is complete). If you are not sure how to make a backup of your data, please call Senior Systems Product Support (508-480-0101, option 1), and ask for a member of our Technology group for assistance.

Ascendance Cloud Schools: You **must contact Senior Systems Product Support** to have us take a special backup copy of your database before proceeding. Please email us at seniorsystems-support@communitybrands.com at least **24 hours in advance** of when you will be performing your end of year update. We will save the previous night's backup as your end of year backup copy. We are not able to take individual database backups during the business day. Please note that only 1 end of year backup of your database is allowed per year. We cannot do incremental backups for a given year.

What's Next

After your database has been backed up, you are ready to proceed to Task 4: Run End of Year.

Task 4: Run End of Year

Once you have completed Task 3: Data Backup, you are ready to run the end of year processes for each Ascendance application.

Note that all other users will need to be logged out of the Ascendance applications while end of year is being performed. You will need to close each application before opening the next one to proceed.

The following checklists (used in this order) will guide you through the correct sequence to perform end of year:

Business Office Checklist - End of Year Processing

Alumni/Development Checklist - End of Year Processing

Academic Office Checklist - End of Year Processing

What's Next

After you have run end of year for all relevant Ascendance applications, you are ready to proceed to Task 5:Run Student Grade Update.

Business Office Checklist - End of Year Processing

Note:

*Recommended tasks are listed in black

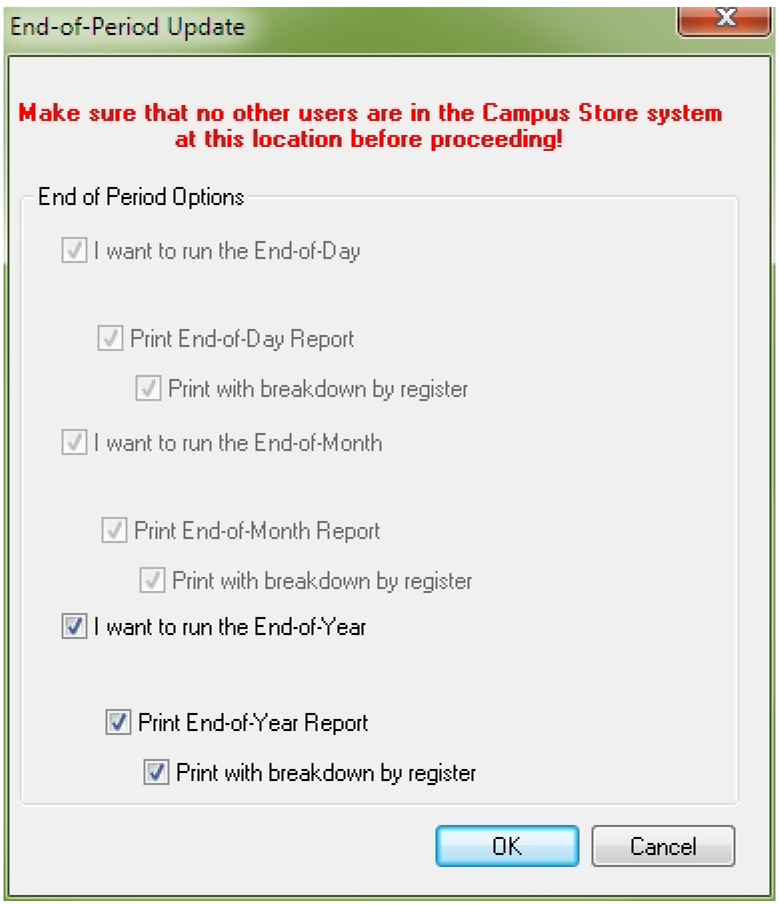
***Required tasks are listed in red**

Important:

Make sure that all users are logged out of the Business Office applications before attempting to perform End of Year Update.

Campus Store

- ☐ **Run End of Month/End of Year Update from the End of Period Update screen.**



- ☐ After the update is complete, **log out of the Campus Store application.**

General Ledger

- ☐ Confirm with your Alumni/Development Office that they have printed the Transmittal reports and have updated the transmittal.
- ☐ **Run End of Period Update.** You can optionally choose to 'Close Last Fiscal Year', however if you do, no further batches can be posted to the previous fiscal year. You can instead choose to leave the previous fiscal year open as long as needed (usually until the completion of your audit) to allow for further updates.
- ☐ After the update is complete, **log out of the General Ledger application.**

Accounts Payable

- ☐ **Run End of Period Update.** You can optionally delete old data from the system at this time. Select the data delete options as desired:

  Check Date for Vendor Paid History – If you enter a date in this field, then all invoices paid with a check date on or before this date will be deleted from the system. Be sure that you have first printed the Vendor History report for this data, as described in the preceding Preparation steps.

  Cash Disbursements Journals – If you enter a date in this field, then all cash disbursements data with a posting date on or before this date will be deleted from the system. Be sure that you have first printed the Check Register report for this data, as described in the preceding Preparation steps.

  Delete Temporary Vendors – When you click Update, you are prompted with the option to delete temporary vendors. If you have a number of these temporary vendor records, this is a good time to delete them. These vendors will be deleted ONLY if there is no activity for the current fiscal year, AND there are no *Un-cleared* paid history records.

- ☐ After the update is complete, **log out of the Accounts Payable application.**

Accounts Receivable

- ☐ **Run End of Period Update.** You can **optionally** delete/summarize old data from the system at this time. Select the data delete options as desired:

  Charges for Statement Date – If you enter a date in this field, all student charges that appeared on statements dated before this date are summarized in a single transaction coded as *B and displaying the date you enter here, and then deleted. Note that the deletion is based on the Statement Date of the charge, and not on the Charge Date. Any charges that have not yet appeared on a statement are NOT summarized or deleted.

  Debit Charges for Statement Date – If you enter a date in this field, all debit transactions that appeared on statements dated before this date are summarized into a single transaction, displaying the date you enter here, and then deleted. Note that the deletion is based on the

Statement Date of the charge, and not on the Charge Date. Any debit transactions that have not yet appeared on a statement are NOT summarized or deleted.

- ☐ After the update is complete, **log out of the Accounts Receivable application.**

Student Loans

- ☐ **Run End of Period Update.**
- ☐ After the update is complete, **log out of the Student Loans application**.

Alumni/Development Checklist - End of Year Processing

Note:

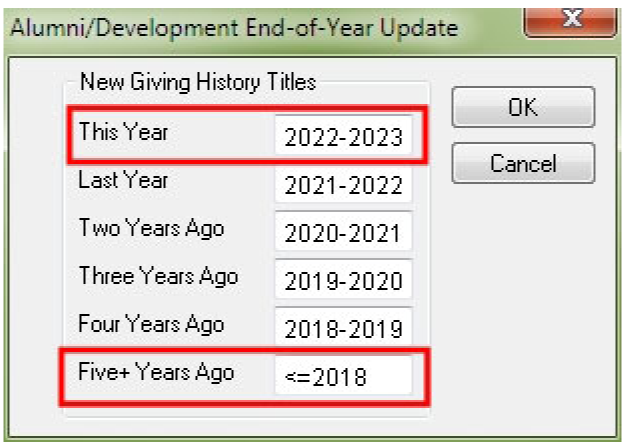
*Recommended tasks are listed in black

Required tasks are listed in red

Important:

Make sure that all users are logged out of the Alumni/Development application before attempting to perform End of Year Update.

- ☐ Confirm with your Business Office that they have run General Ledger End of Year Update.
- ☐ **Run End of Period Update.** You will be prompted to enter new Fiscal Year Headings for the Constituent Giving Summary. Annual Giving Levels will become a historical entry on the Summary tab in Constituent Maintenance for the year just ended, and all Year-To-Date totals will be reset to zero.



Academic Office - End of Year Processing

You will need to run end of year processing separately for each academic division.

Note:

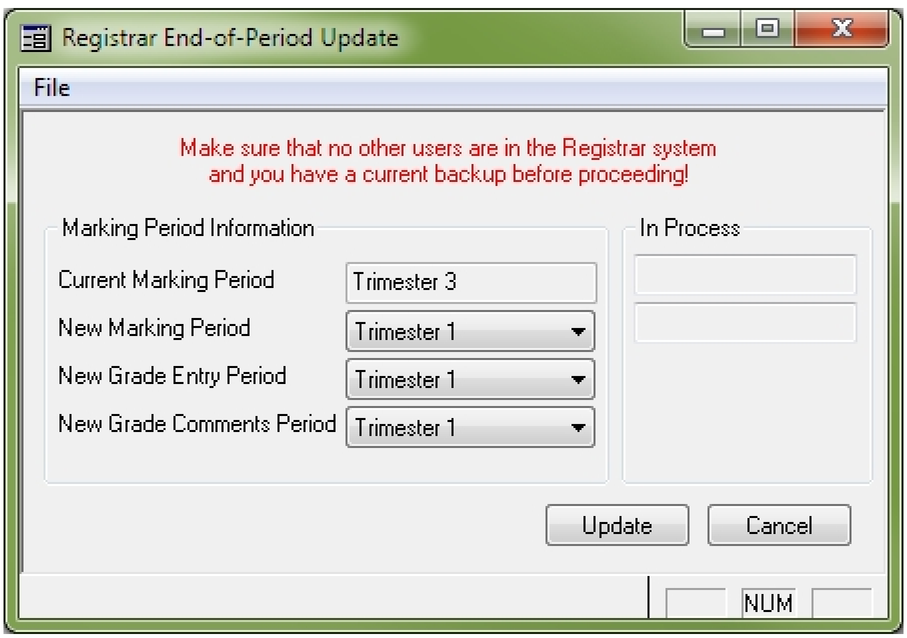
*Recommended tasks are listed in black

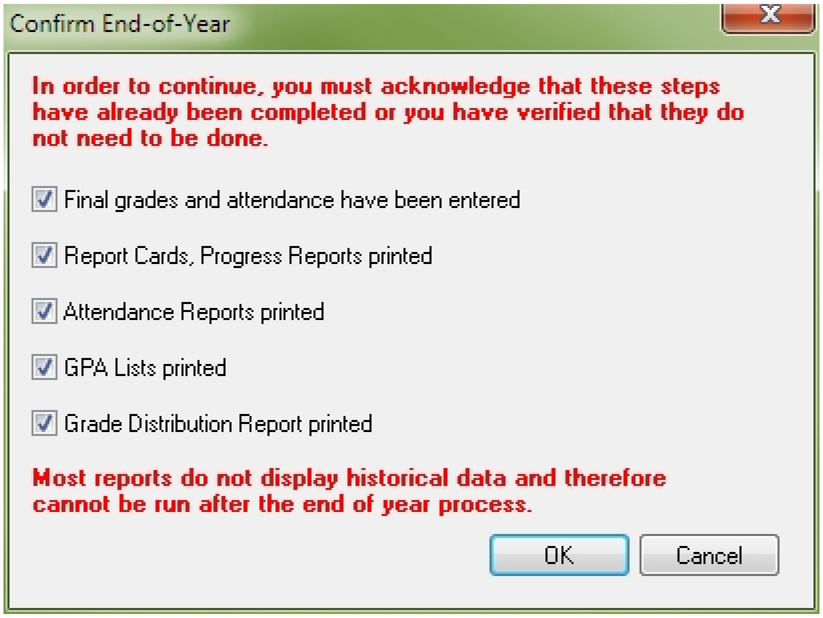
***Required tasks are listed in red**

Important:

Make sure that all users are logged out of the Academic applications before attempting to perform End of Year Update.

- ☐ **Run End of Period Update for each division.** You will want to have the new Marking Period, Grade Entry Period, and Grade Comments Period set to the first marking period for the year. You will also need to use the checkboxes on the confirmation screen to verify that you have completed data entry and run all relevant reports for the division.





☐ For schools who set the Student Group field for incoming students something other than *Student*, this is a good time to run a Global Update in Registrar to change the Student Group field to *Student* for these new students.

☐ **Data check:** verify that all new students have been transferred into Registrar via the New Student Transfer function. This MUST be done before performing Student Grade Update.

☐ If needed, print/save to PDF a Student List report to get the number of students you had enrolled at the end of the year.

Please be patient as this will take a while to process all of the students.

Task 5: Run Student Grade Update

Once you have completed Task 4: Run End of Year for all relevant applications, you are ready to proceed with Student Grade Update.

The Student Grade Update function is the last step in the end of year processing for the academic and fiscal year. This process copies the Next Year data for students to become This Year data, creates new Next Year student data, moves students to their next grade, updates the Student Group and optionally deletes selected data for graduating and withdrawing students (depending on your system settings), transfers graduates to become constituents in Alumni/Development, and updates related constituent records (such as parents) appropriately.

Best Practice: We highly recommend that you clear the Transfer flag from all media associated with your graduating class. Check our Help Site for the End of Year Media Transfer video.

You will not be able to perform this function unless you have completed all end of year processing in all of the Business Office modules, Alumni/Development, and Registrar (all divisions). It is also very important to identify and correct any problems with student data before proceeding, as described in the Preparation Checklist section below. And remember that the person running Student Grade Update will need information from the other departments to complete the process.

After this process is complete, if your school uses My BackPack, you may also want to run Remove Groups From Web Users to remove their student access to My BackPack.

There are three important parts to this task, which must be performed in the following sequence:

Student Grade Update - Preparation Checklist

Perform Student Grade Update

Remove Groups From Web Users For Graduates

Note: The actual Student Grade Update function is found in System Administration, and the user who runs it must be logged in as the schema owner.

What's Next

After Student Grade Update has completed successfully, you are ready to proceed to Task 6:Next Steps.

Student Grade Update - Preparation Checklist

☐ Verify that you have completed all end of year processing as described in the following checklists:

Business Office Checklist - End of Year Processing

Alumni/Development Checklist - End of Year Processing

Academic Office Checklist - End of Year Processing

☐ If your school has the Alumni/Development application installed and you are not familiar with which options to select on steps 4-6 of Student Grade Update, please contact your school's Alumni/Development Office to determine the correct values for each screen before proceeding with the Student Grade Update.

☐ **Verify that there are no students listed on the New Student Transfer screen in Registrar or Accounts Receivable**. If there are, transfer them into Registrar and/or Accounts Receivable before proceeding. *** Important:** Any records transferred into RG or AR after the Student Grade Update process will need to be manually edited to set the correct Next Year grade and school.

☐ Verify that you have NOT manually changed the Student Group for any graduating students to *Graduate*; that process will be automatically performed during Student Grade Update, but only if these students still have a Student Group of *Student*.

☐ **If you have set the Student Group for incoming students to something other than *Student* (e.g. *New Student*), use Global Update now to change the value to *Student*, so that all of next year's students are in the Student Group *Student*.** Note that the current year grade and next year grade for new incoming students is typically set to the same value; this is not a problem as the system will handle them properly.

☐ **If you have withdrawn students who are returning next year, you will now need to manually update their student group to *Student*.**

☐ **Data check:** make sure that you have at least one Student Group and at least one AR Group set up with a *Graduates* type by going to Accounts Receivable **Maintenance** > **A/R Groups** or Registrar **Maintenance** > **Miscellaneous** > **Student Groups**. It is also recommended that you have at least one group set up for current students, and at least one group set up for withdrawn students, if you have not set these up previously. When you first set up a group for withdrawn students, you are asked to enter the class year for your current graduating class, which should be set to 2022.

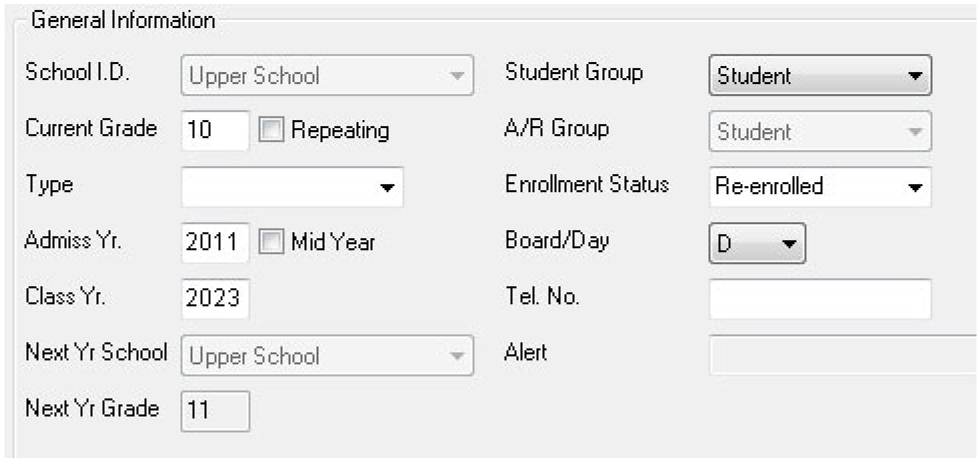
☐ **Data check: make sure the Student Group and AR Group are set correctly for student records in each sub-group of students (returning students, new students, withdrawing students, and graduating students), as per the sample screens shown below. It is essential that these fields be set correctly to get students into the right grades. Note that Enrollment Status does not matter for end of year processing, as that field is always reset during the enrollment process.**

Returning Students (Including Previously Withdrawn Students Returning Next Year)

Current Year

Student Group = ***Student***

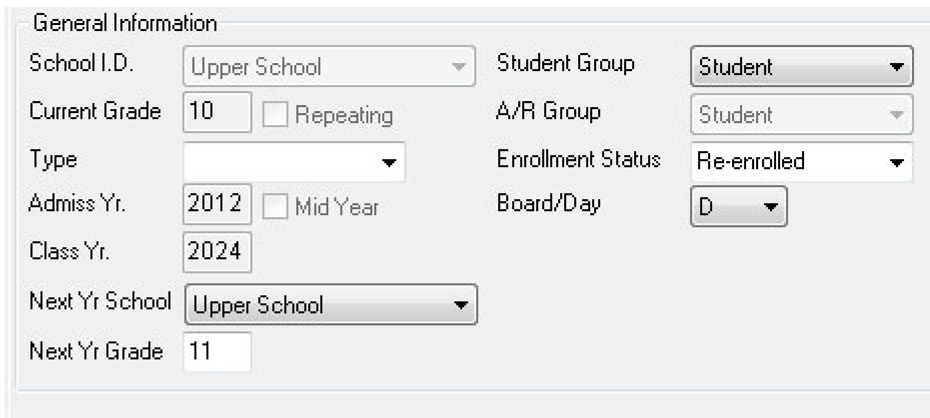
A/R Group = ***Student***



Next Year

Student Group = ***Student***

A/R Group = ***Student***

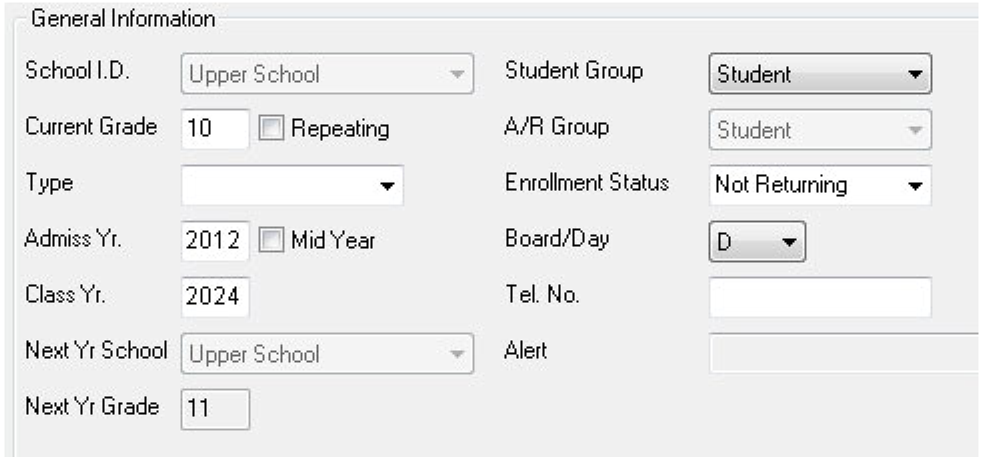


Withdrawing Students

Current Year

Student Group = *Student*

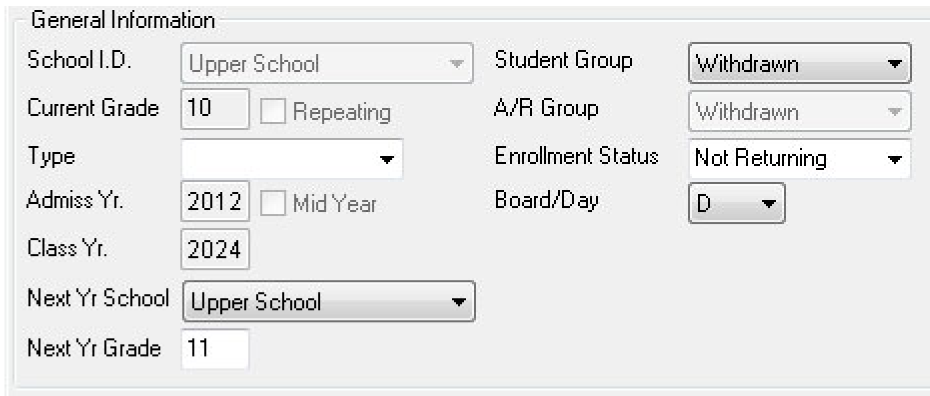
A/R Group = *Student*



Next Year

Student Group = *With-drawn*

A/R Group = *With-drawn*

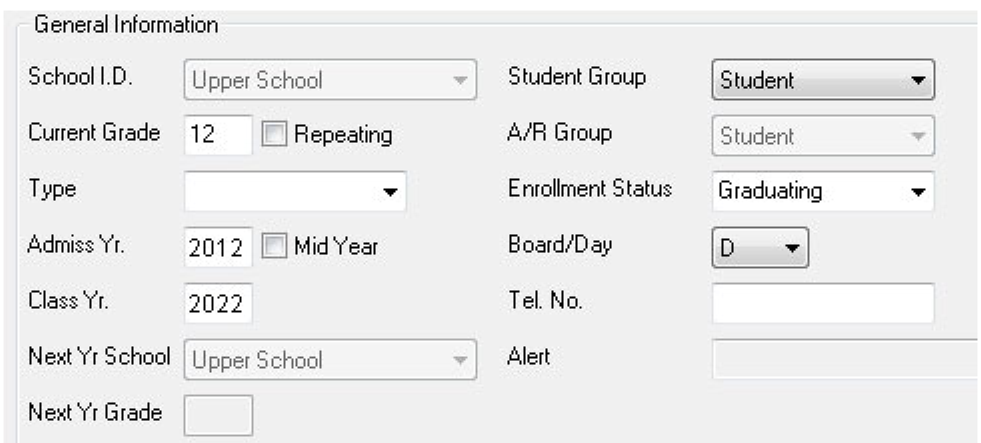


Graduating Students

Current Year

Student Group = *Student*

A/R Group = *Student*

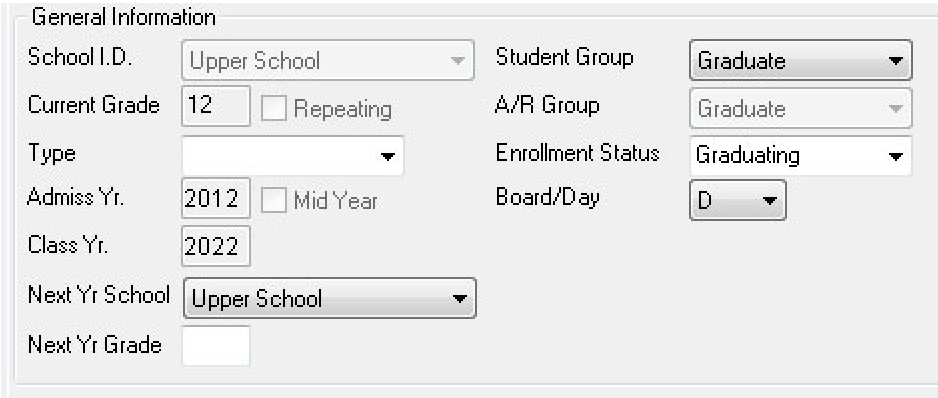


Next Year

Student Group = ***Graduate***

A/R Group = ***Graduate***

Next Yr Grade = blank



☐ **Data check:** run some reports to verify next year student information, as shown in the examples below (if you don’t have the Registrar application installed, replace STUDENT_GROUP with AR_GROUP in the query parameters).

1 - Run the Student ID List with the following query parameters to check that all returning and new students will be in the correct grade after Student Grade Update has been run. Check the ‘Show Next Year Information’ option on the reports menu screen when you run this report.

<u>Query Parameter Conditions:</u>

OR STUDENT_GROUP = STUDENT

<u>Query Parameter Sorting:</u>

RG_STUDENT.CURRENT_GRADE_SORT ✓ Total

RG_STUDENT.SORT_KEY

2 - Run the Student ID List with the following query parameters to check that all the correct students are set to graduate next year. Check the ‘Show Next Year Information’ option on the reports menu screen when you run this report.

<u>Query Parameter Conditions:</u>

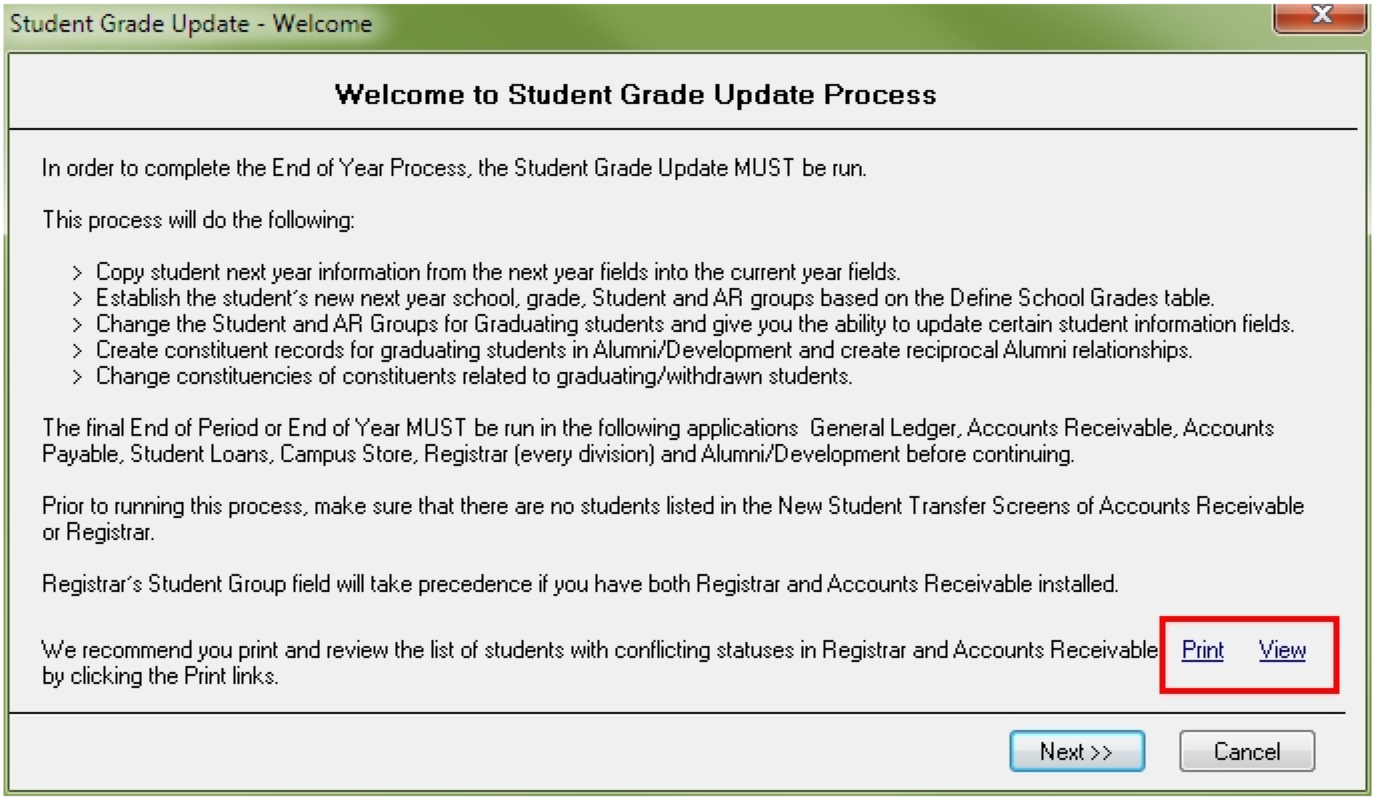
OR RG_STUDENT STUDENT_GROUP = GRADUATE

AND RG_STUDENT CLASS_YR = 2022

<u>Query Parameter Sorting:</u>

RG_STUDENT.SORT_KEY

☐ **Data check:** if you have both Registrar and Accounts Receivable installed, view or print the Student Status Conflict List report that is linked on the first screen of Student Grade Update, to view any students who have a different Student Group than AR Group. (Select Student Grade Update from the main menu in the System Administration application. Click the one of the links to view or print the report. You can then cancel the process if you need to make any data changes before proceeding.) Note that in the event of a conflict between the two groups, the Registrar Student Group will take precedence over the AR Group.



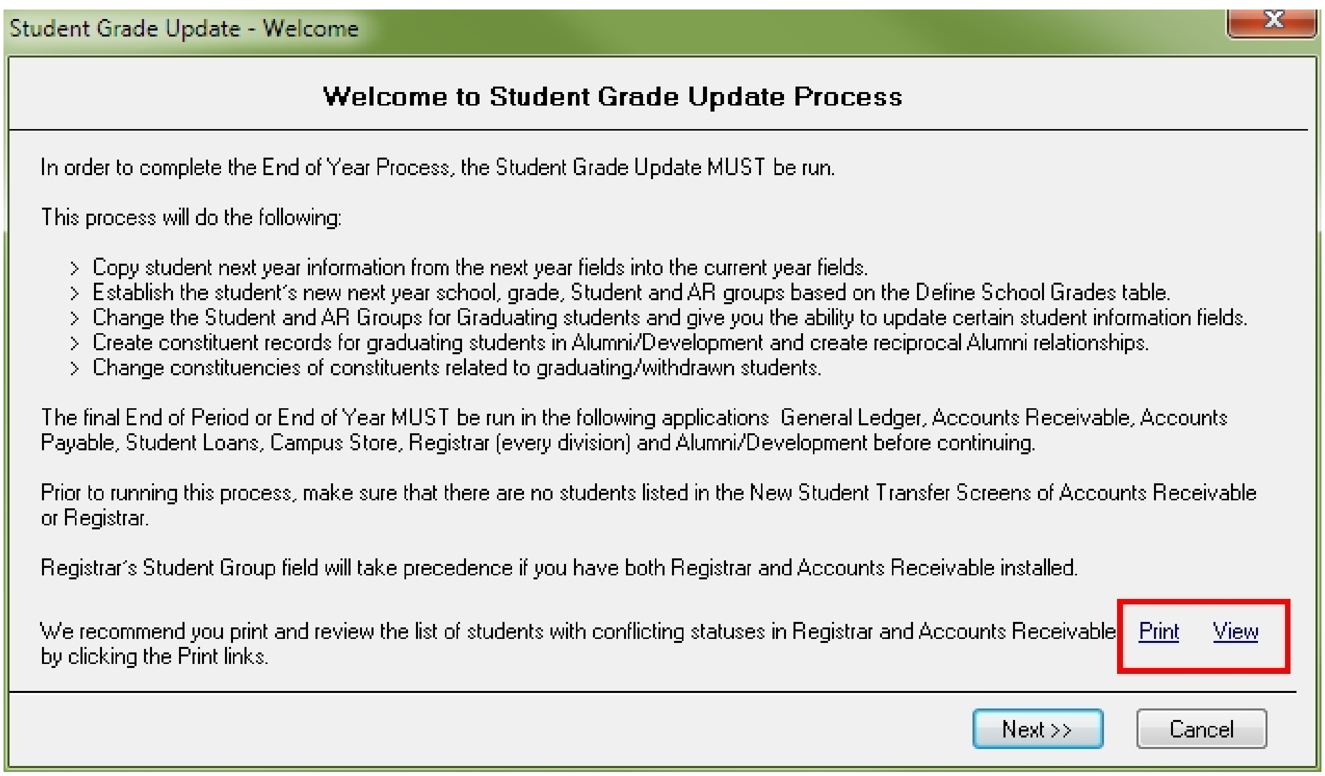
How To Perform Student Grade Update

Notes:

1 - The number of steps in this process will vary, depending on whether or not you have the Alumni/Development application installed, when your system is set to transfer new constituents (at enrollment or at graduation), and whether or not you use the Alumni Community for My BackPack. If you do not have the Alumni/Development application, this process will only have 4 steps.

2 - Be sure that you have first performed all end of year processing and other preparation as described previously in this document.

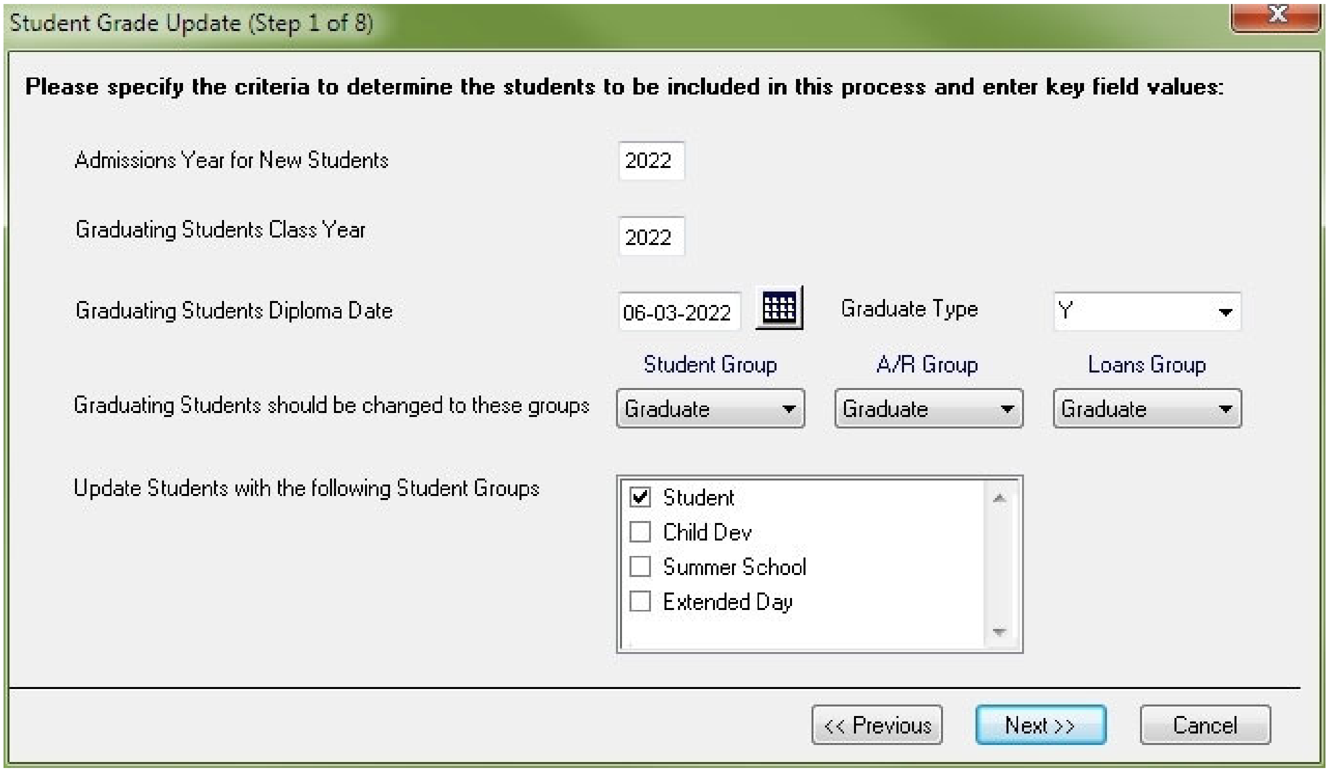
Start: Make sure that all users are logged out of all applications. Log into the System Administration application as the schema owner, and not as a user, and select **File > Student Grade Update** from the main menu. If applicable, and if you have not already done so, view or print the Student Status Conflict List linked at the bottom of the screen, and then click **Cancel** if you need to make data changes. If you are ready to proceed, click **Next**.



Important:

If you have not defined a Student Group for graduating students, you will instead receive a message indicating that you must perform that task in Registrar > Maintenance > Miscellaneous > Student Groups. You must click **Cancel**, and return to try again after creating the group. For more information about setting up a Student Group for graduating students, see the **Data Check** section of Student Grade Update - Preparation Checklist.

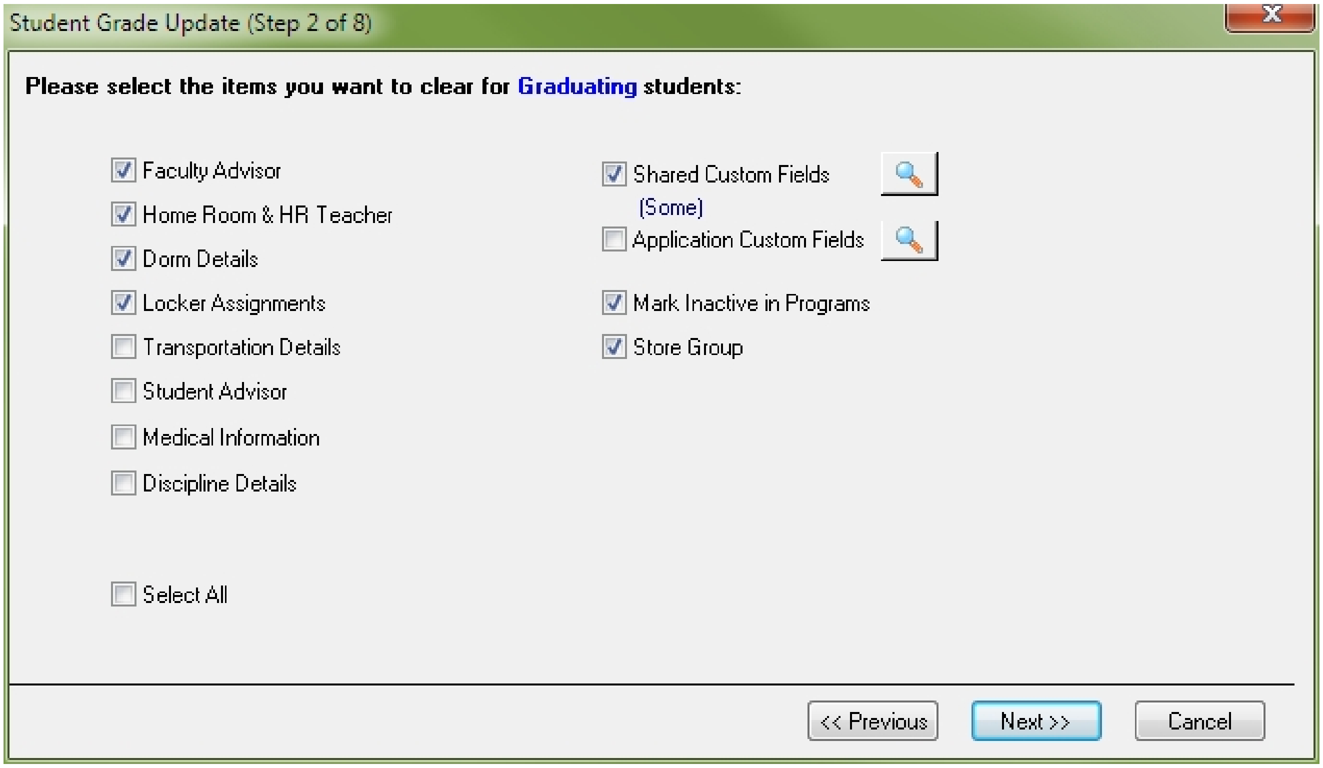
Step 1: Make your selections for the update criteria and parameters as described below, and click **Next**.



Admissions Year for New Students	Used to verify that end of period updates have been completed; this should be set to 2022.
Graduating Students Class Year	This should be set to 2022.
Graduating Students Diploma Date/Graduate Type	Enter or select the Graduation Date for your graduating students; this will only update graduating student records where the Diploma Date field is blank. Graduate Type should be set to *Y*.
Graduating Students should be changed to these groups	Select the appropriate group(s) to be set for graduating students (in most cases, this value will be *Graduate*); only groups with a Type of *Graduate* will be available in the dropdown. This value will also be assigned as the Next Year data for students who will graduate next year. • Student Group applies to Registrar • A/R Group applies to Accounts Receivable • Loans Group applies to Student Loans

Update Students with the following Student Groups	Select all applicable student groups to include in the update; only student groups linked to Current Students or Other will be listed here. If you do not have Registrar installed, A/R Groups will be listed here instead.

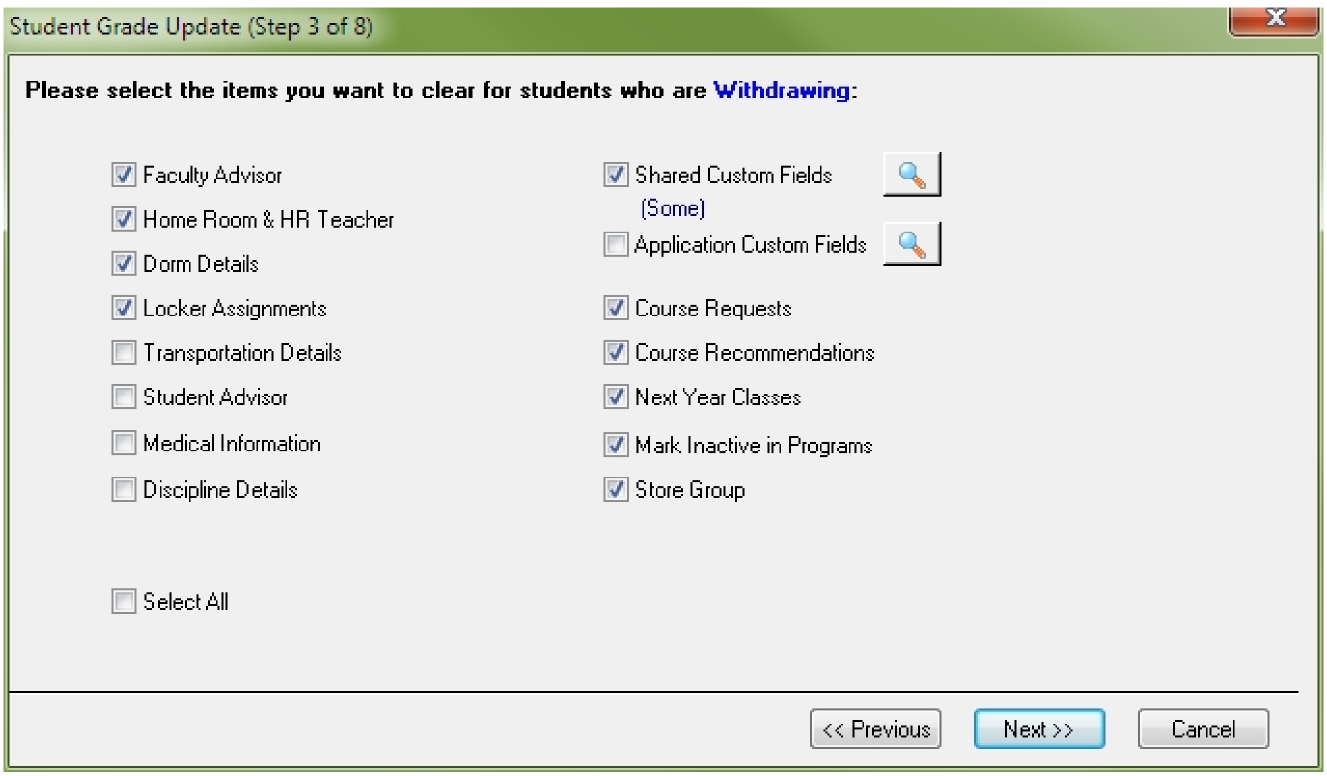
Step 2: Select the types of data that you want to clear from the student records for **graduating** students (or Select All) and click **Next**. By checking the box you will be REMOVING the data selected.



Faculty Advisor	If your school takes attendance by advisor, you should clear these fields to remove graduating students from attendance rosters.
Home Room & HR Teacher	If your school takes attendance by home room or home room teacher, you should clear these fields to remove graduating students from attendance rosters.
Dorm Details	Dorm data should be cleared for reassignment.
Locker Assignments	Locker data should be cleared for reassignment.
Transportation Details	Transportation data may optionally be cleared.
Student Advisor	Student Advisor/Student Mentor field may optionally be cleared.
Medical Information	All data on the Medical tab in Student Maintenance may optionally be cleared.
Discipline Details	All student discipline records may optionally be cleared.

Shared Custom Fields	All or some of the shared custom fields may optionally be cleared. To clear all fields, just check the box for Shared Custom Fields. To clear only selected fields, click the Search icon, select the fields to clear, and then click OK.
Application Custom Fields	All or some of the application custom fields may optionally be cleared. To clear all fields, just check the box for Application Custom Fields. To clear only selected fields, click the Search icon, select the fields to clear, and then click OK.
Mark Inactive in Programs	You can optionally mark students as Inactive in all programs to which they are assigned.
Store Group	Students may optionally be removed from Campus Store.

Step 3: Select the types of data that you want to clear from the student records for withdrawing students (or Select All) and click **Next**. By checking the box you will be REMOVING the data selected.



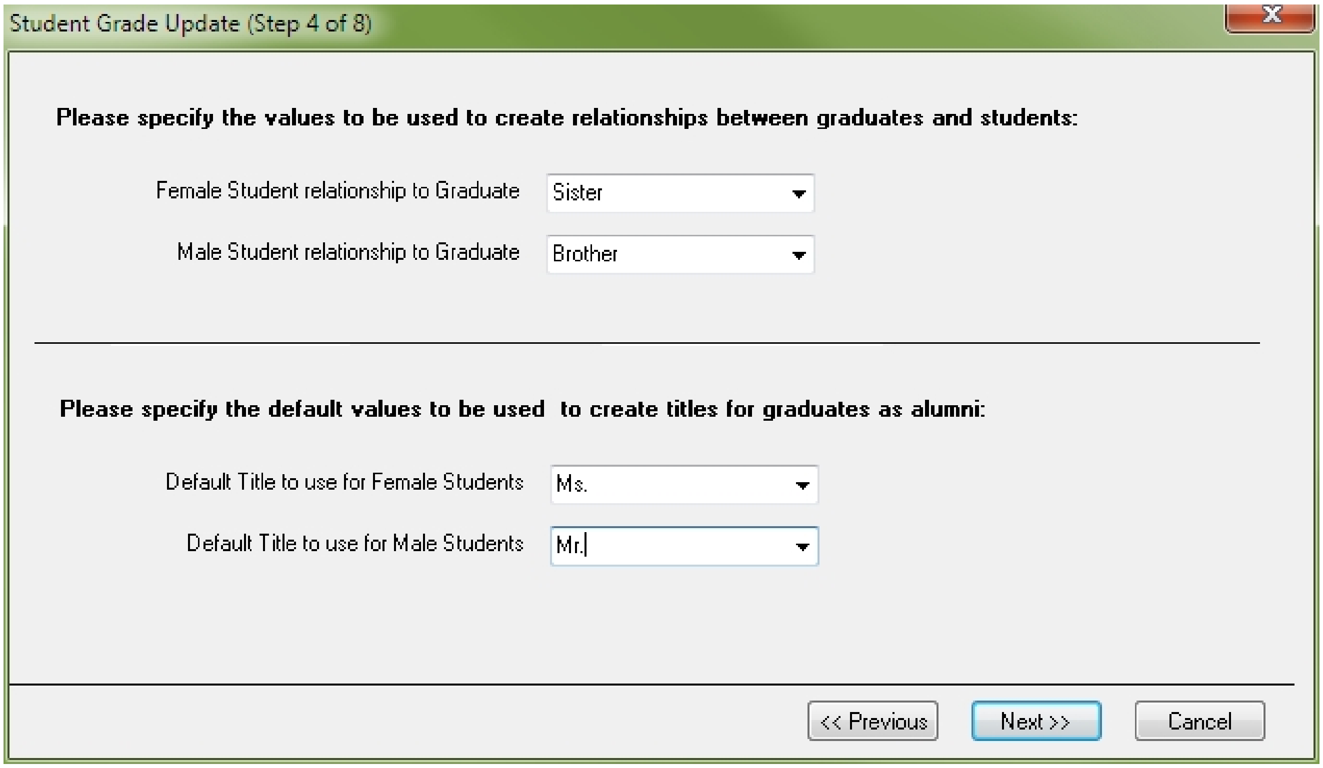
Faculty Advisor	If your school takes attendance by advisor, you should clear these fields to remove withdrawing students from attendance rosters.
Home Room & HR Teacher	If your school takes attendance by home room or home room teacher, you should clear these fields to remove withdrawing students from attendance rosters.

Dorm Details	Dorm data should be cleared for reassignment.
Locker Assignments	Locker data should be cleared for reassignment.
Transportation Details	Transportation data may optionally be cleared.
Student Advisor	Student Advisor/Student Mentor field may optionally be cleared.
Medical Information	All data on the Medical tab in Student Maintenance may optionally be cleared.
Discipline Details	All student discipline records may optionally be cleared.
Shared Custom Fields	All or some of the shared custom fields may optionally be cleared. To clear all fields, just check the box for Shared Custom Fields. To clear only selected fields, click the Search icon, select the fields to clear, and then click **OK**.
Application Custom Fields	All or some of the application custom fields may optionally be cleared. To clear all fields, just check the box for Application Custom Fields. To clear only selected fields, click the Search icon, select the fields to clear, and then click **OK**.
Course Requests	Course requests should be cleared for withdrawing students.
Course Recommendations	Course recommendations may optionally be cleared for withdrawing students.
Next Year Classes	Next year class schedules should be deleted for withdrawing students.
Mark Inactive in Programs	You can optionally mark students as *Inactive* in all programs to which they are assigned.
Store Group	Students may optionally be removed from Campus Store.

Step 4 (Alumni/Development schools only):

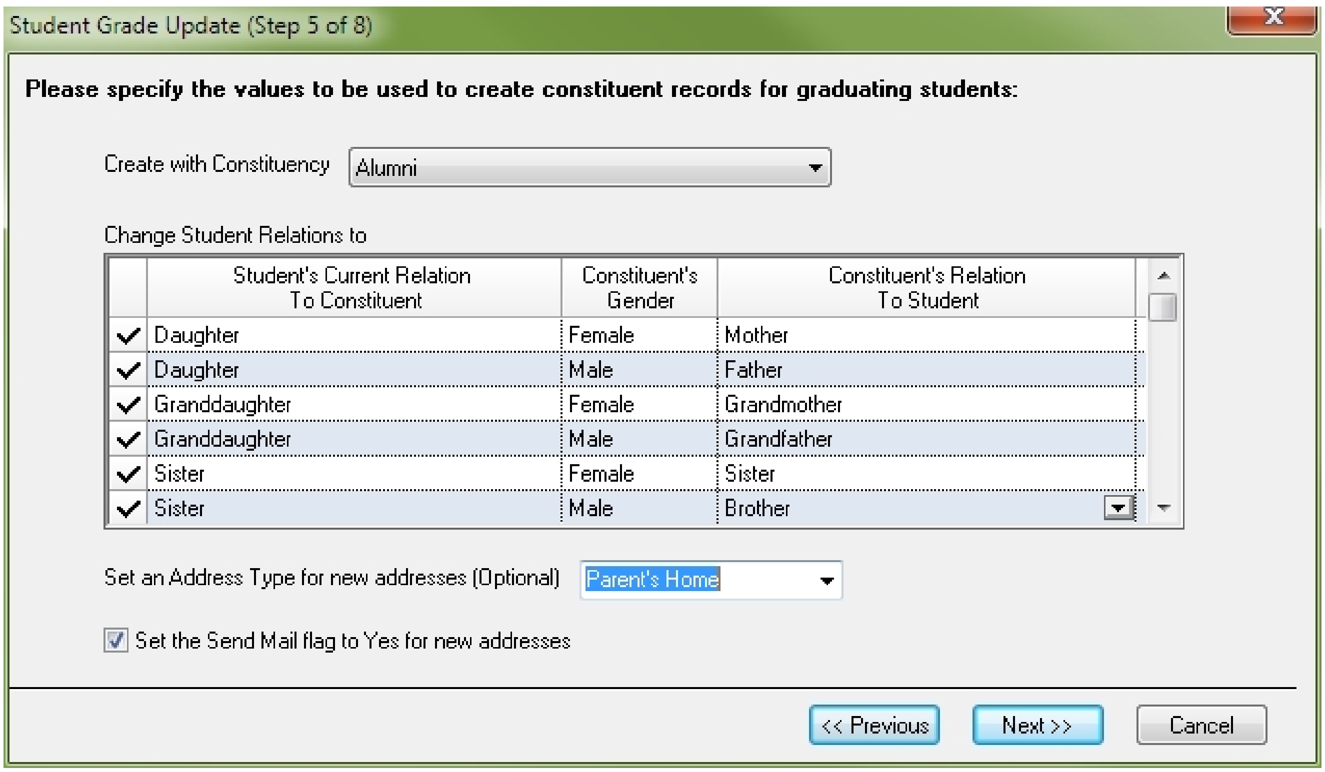
Important: If you are unsure of the values to select in steps 4, 5 and 6, please contact your Advancement Office for assistance.

Select the relationships to be created between graduating students and their male and female siblings who still attend the school, and select the default titles to be inserted into the constituent record for new male and female graduates. Then click **Next**.


Student Grade Update (Step 4 of 8)
Please specify the values to be used to create relationships between graduates and students:
Female Student relationship to Graduate
Sister
Male Student relationship to Graduate
Brother
Please specify the default values to be used to create titles for graduates as alumni:
Default Title to use for Female Students
Ms.
Default Title to use for Male Students
Mr.
<< Previous
Next >>
Cancel

Step 5 (Alumni/Development schools only): Select the parameters for creating the new constituent records for graduating students, and click **Next**.

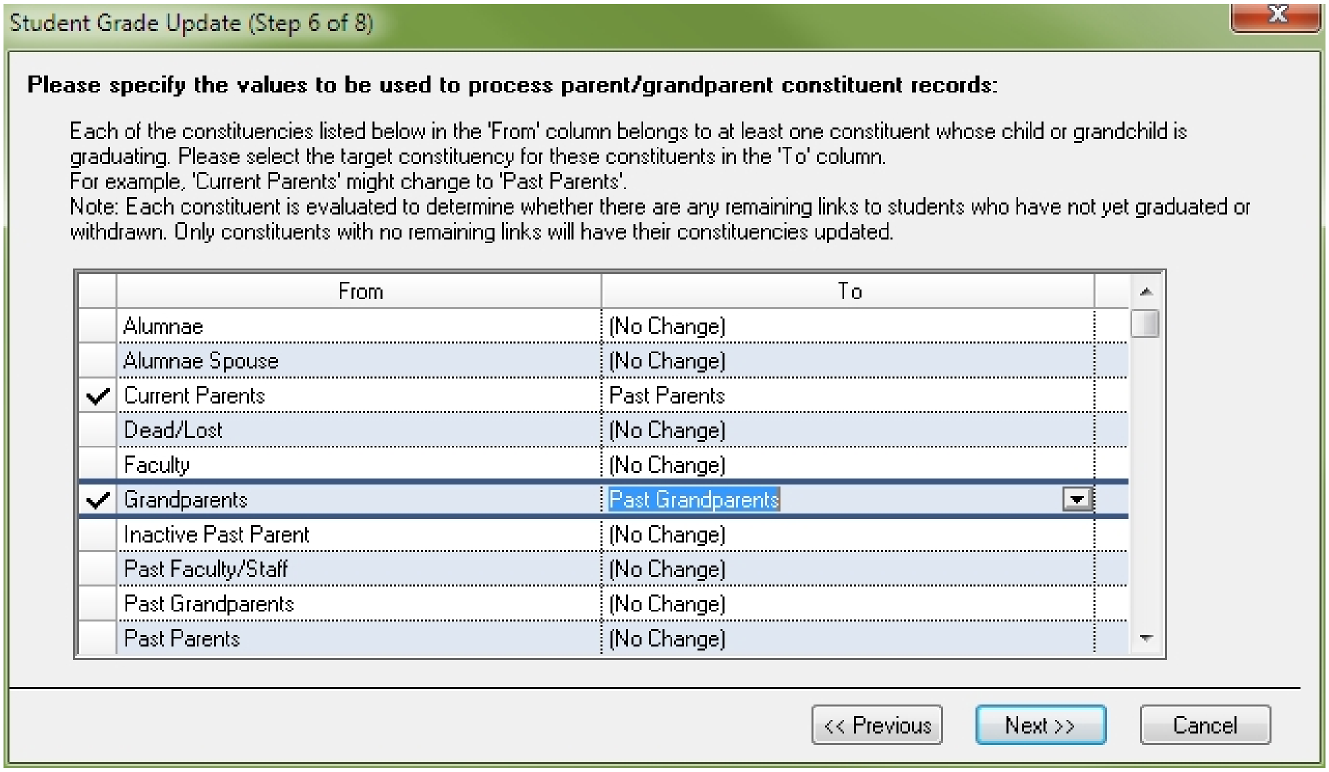
> **Note:**
>
> **You will only see this step if your system is NOT set to transfer student information to Alumni/Development when a student is enrolled (since the constituent records for graduates will have already been created at the time of enrollment)**. This setting is found in Alumni/Development Administration Maintenance on the Preferences tab *(Should student information be transferred to Alumni/Development when the student is enrolled?)*. A value of *Y* indicates that constituent records have already been created at the time of enrollment; a value of *N* indicates that constituent records are created during Student Grade Update.



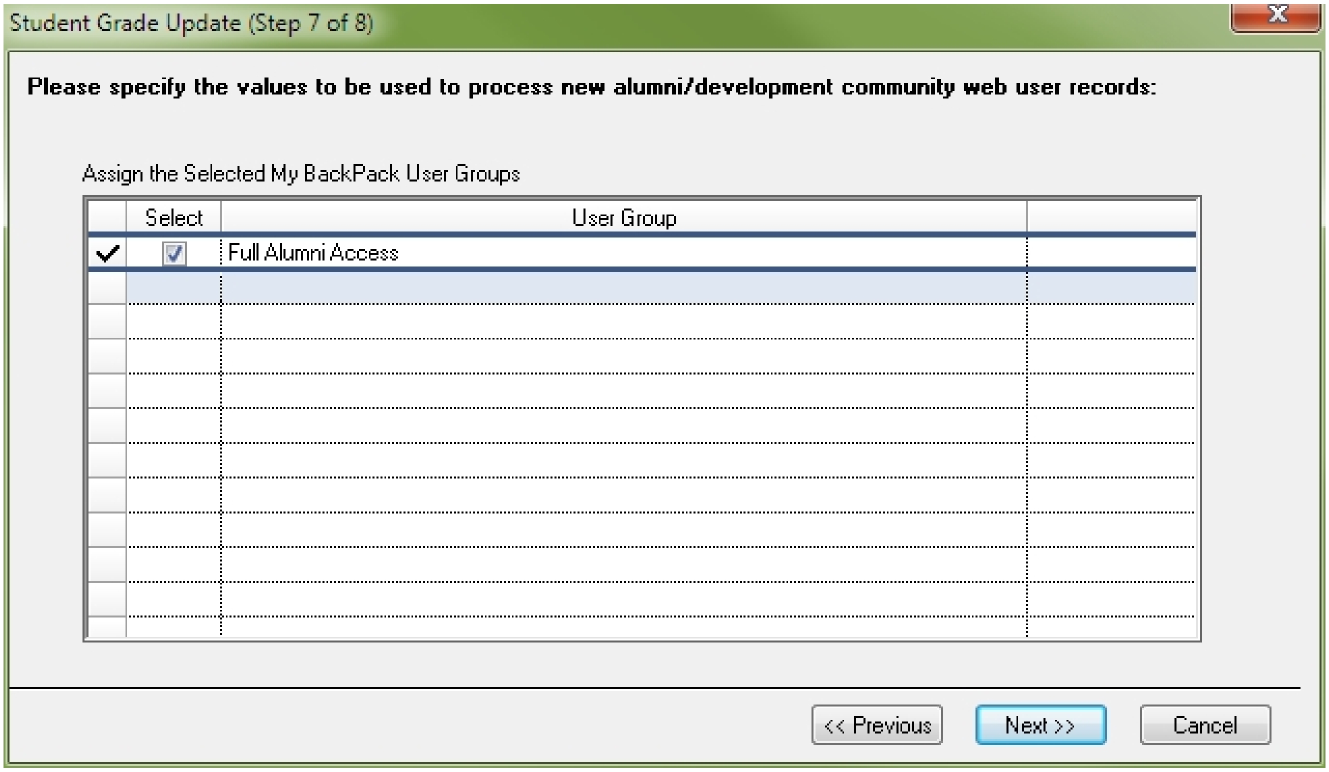
Create with Constituency	Select the primary constituency for graduating students (e.g. *Alumni*)

Change Student Relations to	Select a valid reciprocal relationship for each gender and type of relation. The Constituent's Gender is the gender of the constituent being related to the graduating student. For example: Current Rel. / Const. Gender / Const. Rel. to Student Daughter / Female / Mother Daughter / Male / Father Son / Female / Mother Son / Male / Father Grandchild / Female / Grandmother Grandchild / Male / Grandfather
Set an Address Type for new addresses	Graduating students are assigned a copy of their P1 address which is no longer linked to their parents. You may wish to assign an address type to this address to indicate that it is identical to the student's parents' address. This makes it possible for the Development Office to send a single piece of mail to an address where both the parents and the recently graduated student reside. An example of this use of the field might be *Parents Home*.
Set the Send Mail flag to Yes for new addresses	Checking this box sets the Send Mail flag to *Y* for the newly created addresses for the graduating students.

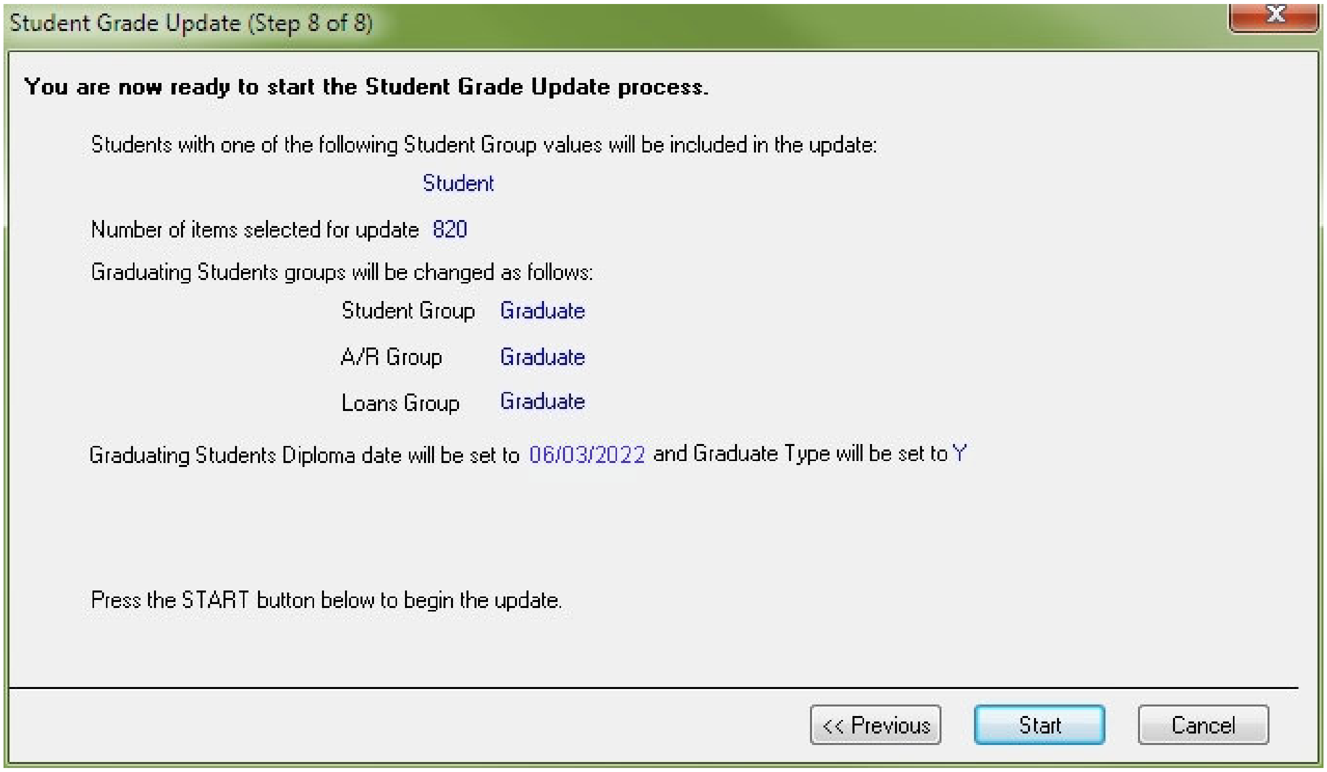
Step 6 (Alumni/Development schools only): Specify any changes that need to be made to the Constituency for existing constituents (such as parents and grandparents) who will no longer have any related students enrolled in the school. For example, *Current Parents* might become *Past Parents*, *Grandparents* might become *Past Grandparents*, etc. These changes will NOT be made for constituents who still have related students at the school. For constituencies that are not affected by the graduation of students, or if your school does not distinguish between current and past constituencies, just leave the value in the To column set to *No Change*. Then click **Next**.


Student Grade Update (Step 6 of 8)
Please specify the values to be used to process parent/grandparent constituent records:
Each of the constituencies listed below in the 'From' column belongs to at least one constituent whose child or grandchild is graduating. Please select the target constituency for these constituents in the 'To' column.
For example, 'Current Parents' might change to 'Past Parents'.
Note: Each constituent is evaluated to determine whether there are any remaining links to students who have not yet graduated or withdrawn. Only constituents with no remaining links will have their constituencies updated.
From
To
Alumnae
(No Change)
Alumnae Spouse
(No Change)
Current Parents
Past Parents
Dead/Lost
(No Change)
Faculty
(No Change)
Grandparents
Past Grandparents
Inactive Past Parent
(No Change)
Past Faculty/Staff
(No Change)
Past Grandparents
(No Change)
Past Parents
(No Change)
<< Previous
Next >>
Cancel

Step 7 (Alumni/Development schools only): If your school uses the Alumni Community of My BackPack, select which My BackPack security group(s) to assign to the new graduate constituents, and then click **Next**.



Step 8: Confirm that the information is correct, and click **Start** to begin the update process. Note that the Number of items selected for update is the total number of records to be affected, and therefore may be significantly greater than the number of students graduating. Progress will be displayed as the update proceeds.



Finish: When the update is complete, you will receive the message *Your End-of-Year process is now complete!* Click **OK**, and then check your data to verify that students have advanced correctly, that the graduating class has "graduated", and that both graduate and parent constituents have been correctly updated in the Alumni/Development application.

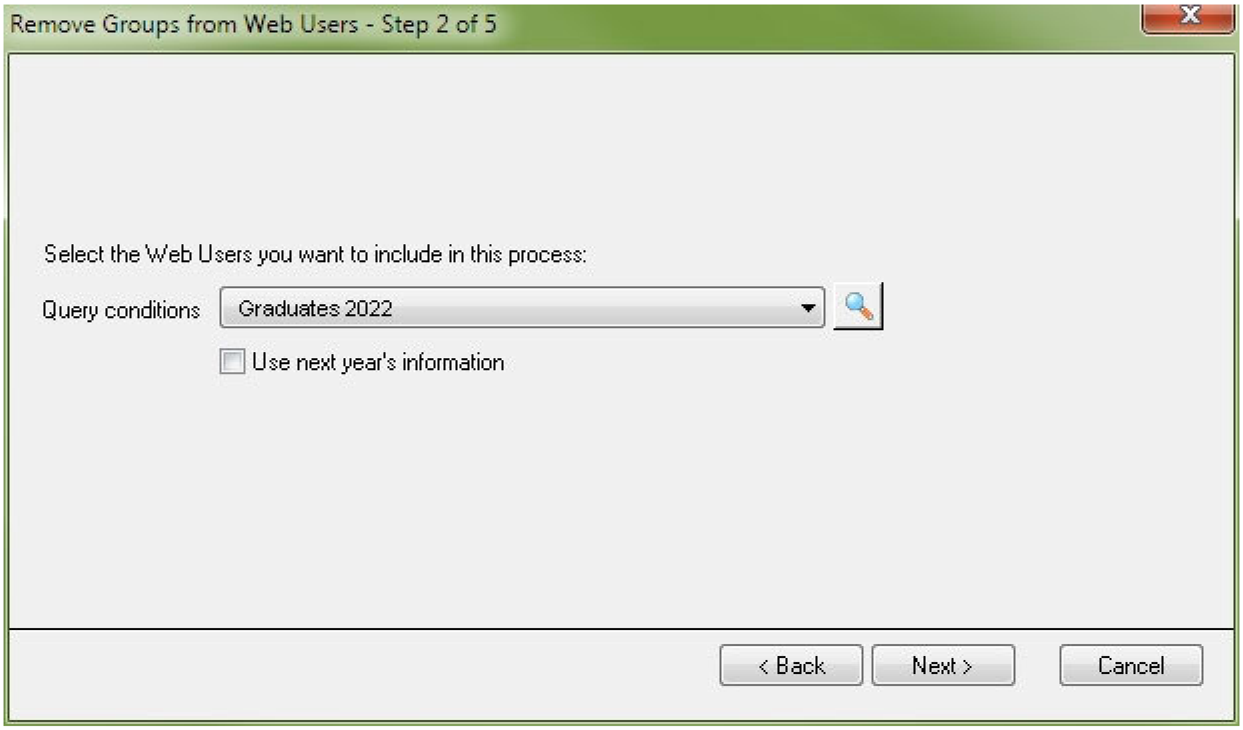
How To Remove Groups From Web Users For Graduates

For schools who use the Student Community in My BackPack, now is a good time to remove the My BackPack security group(s) from students who have just graduated.

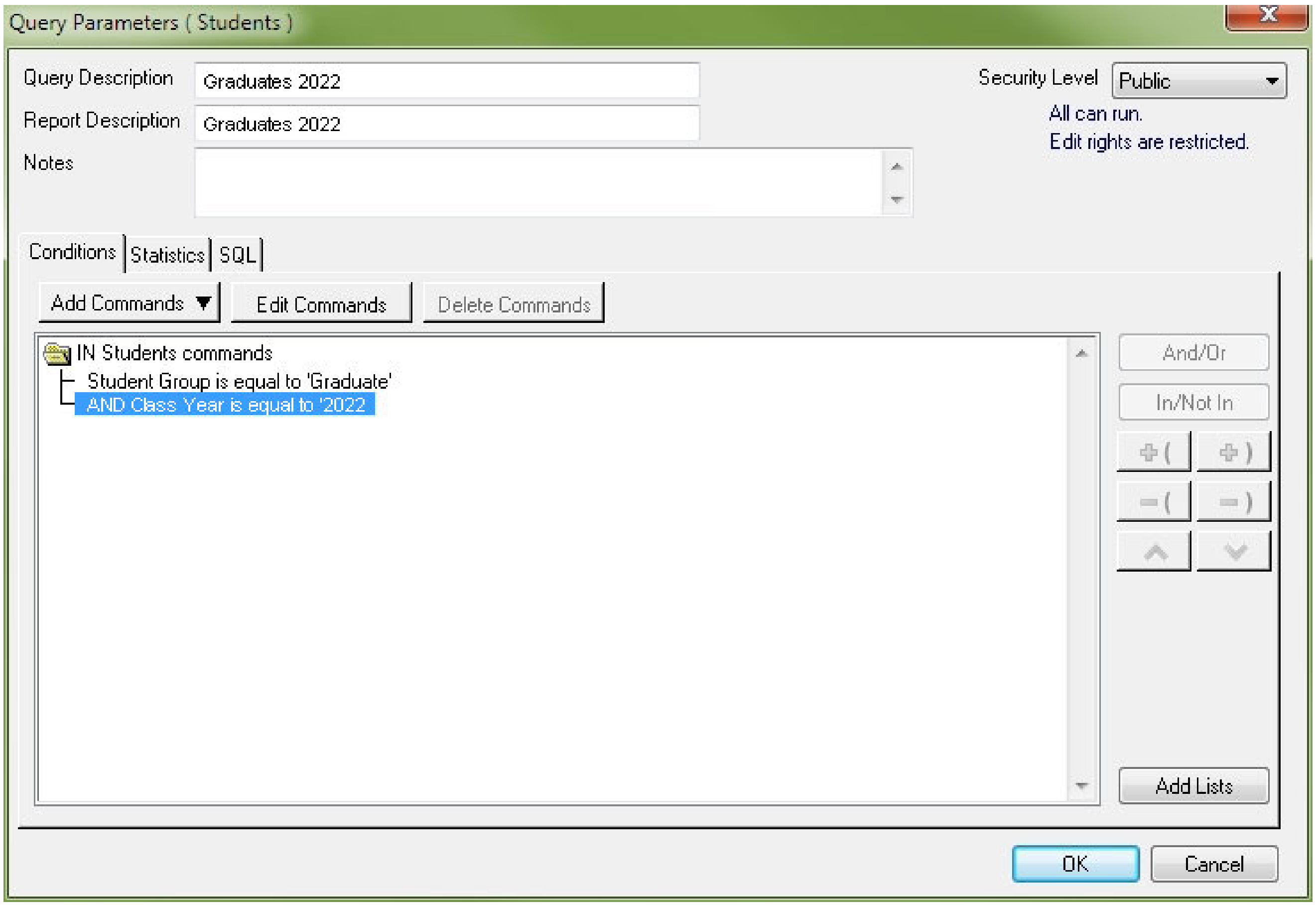
Start: Select **My BackPack > Remove Groups From Web Users** from the main menu in the System Administration application.

Step 1: Select Students from the list of user types, and click **Next**.

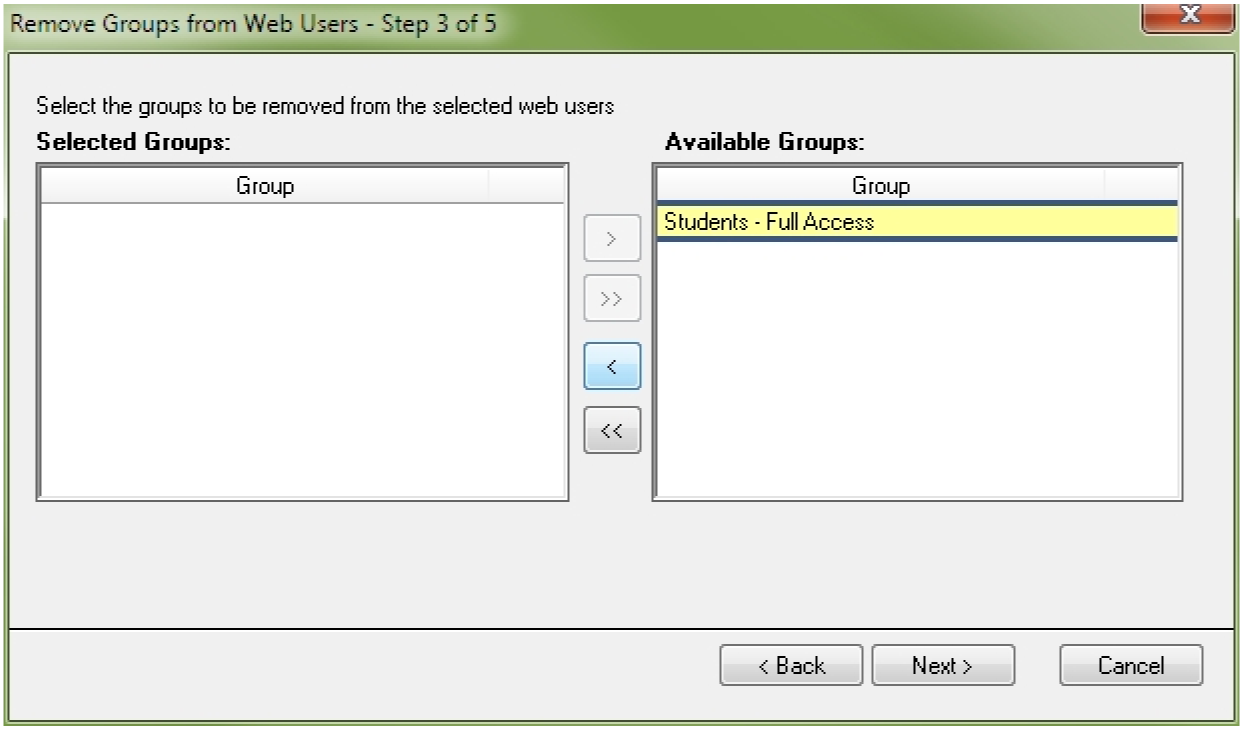
Step 2: Select a query that identifies the group of students who just graduated, and click **Next**.


Remove Groups from Web Users - Step 2 of 5
Select the Web Users you want to include in this process:
Query conditions
Graduates 2022
Use next year's information
< Back
Next >
Cancel

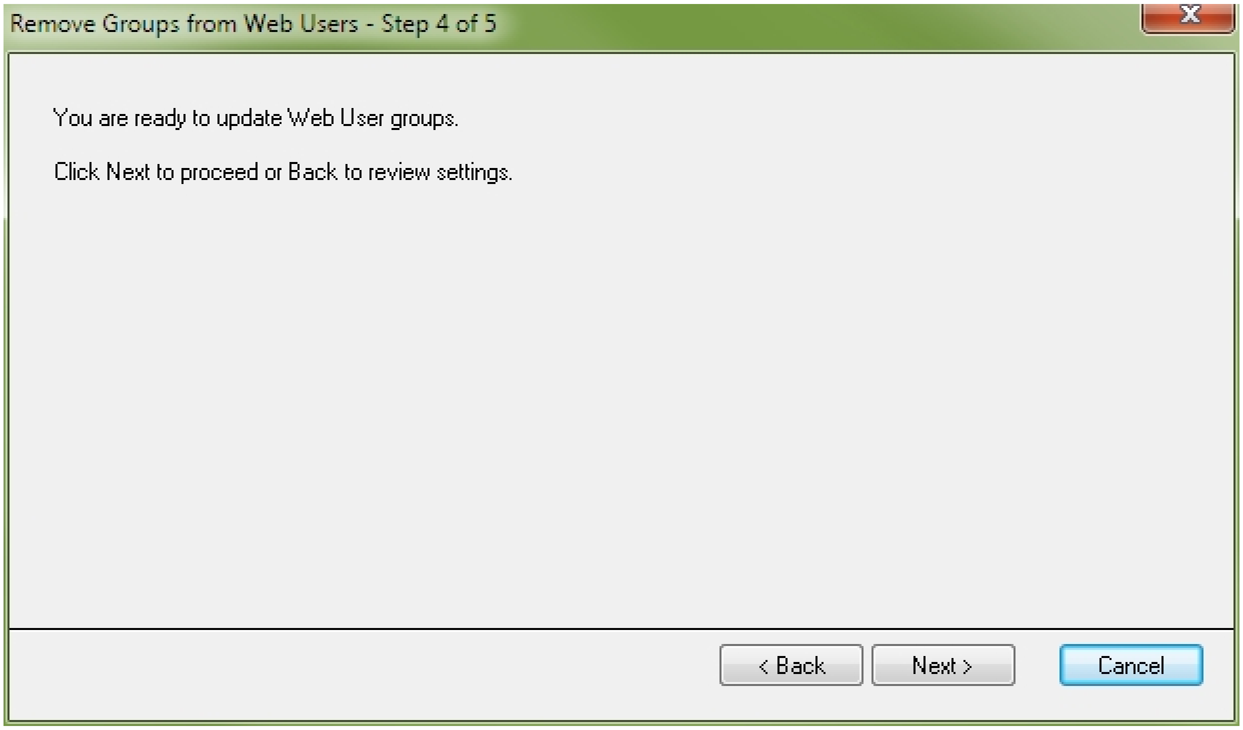
If you need to create a new query for this group, click the Search icon, then click **New**, and create a query with the following conditions:



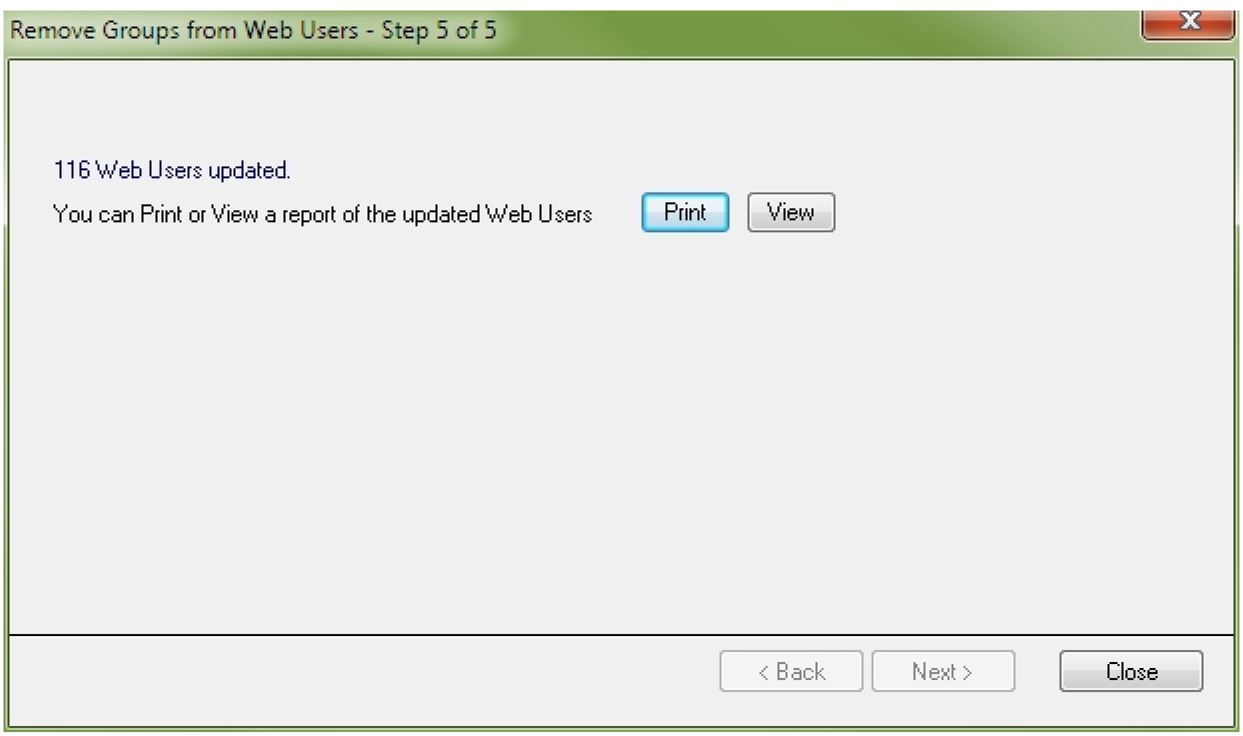
Step 3: Select the security group to remove from the right pane, and click the Left Arrow to move it to the left pane. Repeat for all applicable security groups. Then click **Next**.


Remove Groups from Web Users - Step 3 of 5
Select the groups to be removed from the selected web users
Selected Groups:
Available Groups:
Group
Group
Students - Full Access
< Back
Next >
Cancel

Step 4: Confirm that you are ready to proceed and click **Next** to begin.



Step 5: After the process is complete, you can click **View** or **Print** to see the report of web users for whom the security groups were removed. Then click **Close**.



Task 6: Next Steps

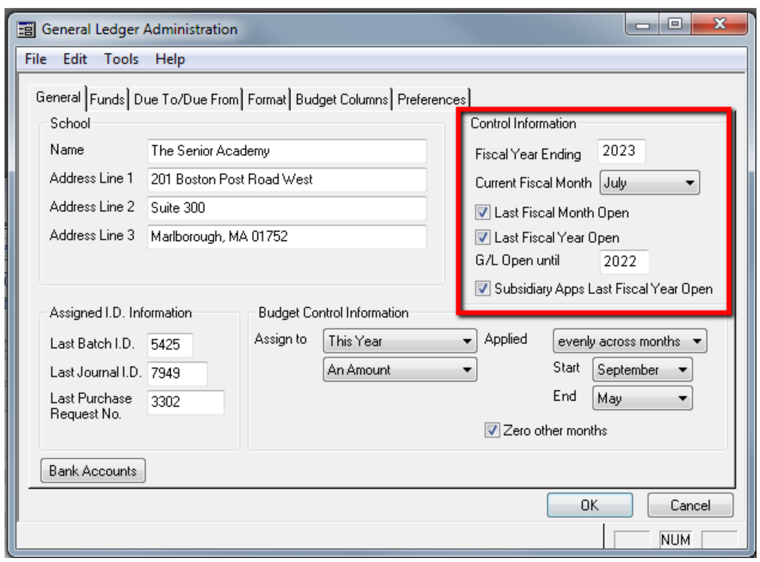
After you have completed Task 5: Run Student Grade Update, there are a few things you need to do to set up your data for the new school year.

Alumni/Development

- ☐ You will now need to bring in all of the new and withdrawn families, as this has NOT been done automatically by the system.
- ☐ If the school has identified new families with a new constituency, they should consider updating them at this time.

Business Office

- ☐ You can continue to post batches back to the previous fiscal year as needed to complete data entry and make adjustments. If you wish to do this, make sure your General Ledger Administration Maintenance settings are configured to allow it:

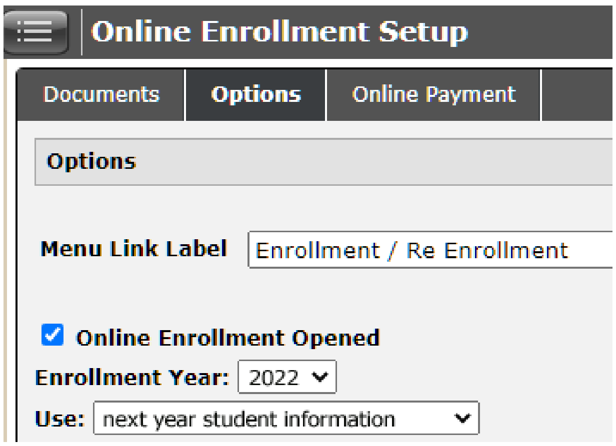


- ☐ **IMPORTANT:** For any new students for the upcoming year that you transfer in from this point forward, you will need to manually edit their 'Next Year' information to make sure it is set correctly. Otherwise, these students will not advance correctly when you perform Student Grade Update next year!
- ☐ Business Office personnel should check your **Accounts Receivable > My BackPack > Configuration**, to adjust labels and customized text to reflect the new school year (e.g. ‘2021-2022’ should become ‘2022-2023’), to reset dates for display of statements and/or campus store transactions that parents can view, and, if appropriate, turn off display of ‘Next Year Deposits’ and set it to ‘Current Year Deposits’ or

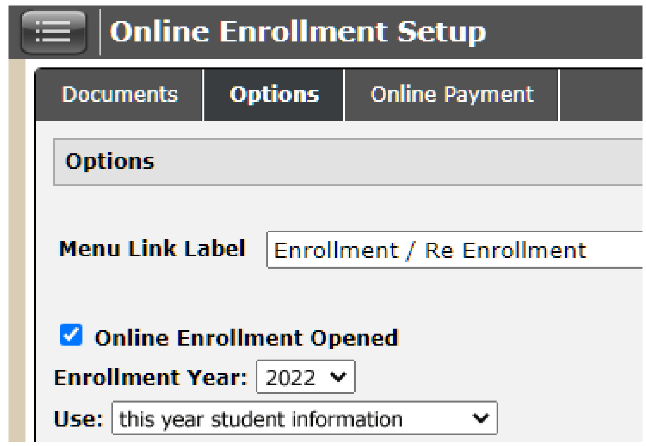
none at all. Be sure to test the My BackPack interface from a test parent account to verify that all pages display as you would expect.

☐ For schools that use Online Enrollment/Re-Enrollment, if your online enrollment process is still open for the upcoming school year, you will need to change the option for the student data to use from 'next year student information' to 'this year student information', so that online enrollment contracts and transactions are applied to the correct school year. This is set in My BackPack, using Online Enrollment Setup > Options.

Before



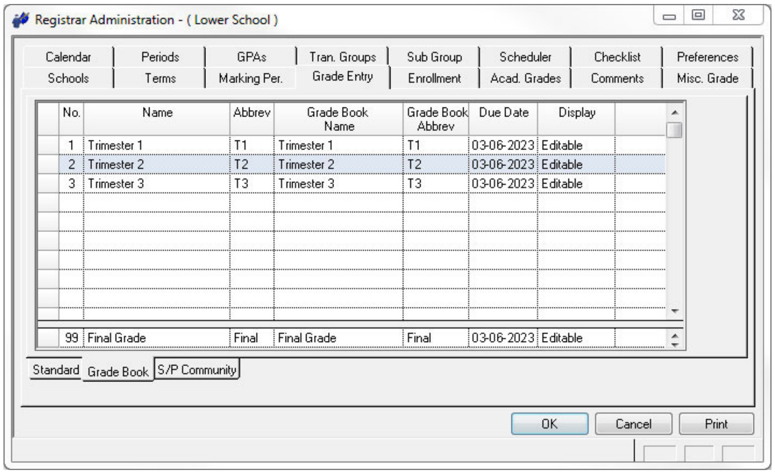
After



☐ For schools that use Deferred Billing, you can now post any Deferred GL Batches as needed.

Academics/Registrar

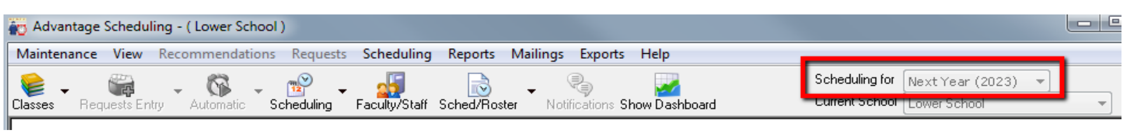
☐ Use **Registrar > Maintenance > Administration Maintenance** for the new academic year (for each division) and select the Calendar tab to set up the calendar for the upcoming school year. If you use Daily Gradebook for My BackPack, you will also need to set up the Grade Entry periods and Due Dates on the Grade Entry tab/Gradebook sub-tab. If you'd like more instructions on Calendar Setup, see How To Set Up the New Year Calendar.



☐ If you use Daily Gradebook for My BackPack and you have set up gradebook templates, you will also need to move your templates to the new academic year using **Admin Community > Grading > Gradebook Template Maintenance** (or **Grading Setup/Tasks > Gradebook Templates**) so that teachers will be able to access them. (This is necessary to account for changes made to Administration Maintenance from year to year.) Select each division and then click **Move Templates To Current Academic Year** to re-activate the templates for the new school year. This must be performed for each division using Gradebooks.

☐ **IMPORTANT:** For any new students for the upcoming year that you transfer in from this point forward, you will need to manually edit their 'Next Year' information to make sure it is set correctly. Otherwise, these students will not advance correctly when you perform Student Grade Update next year!

☐ **IMPORTANT:** If using Scheduling, you will notice that it will still display **Next Year (2023)**. This will remain until you run the **Maintenance** > **Move Schedules to This Year** option. Once you have finished scheduling, it is recommended that you run **Maintenance** > **Initialization** > **Clean Up/Reinitialize** > **Scheduling Restore Points** before moving your Schedules to Registrar.

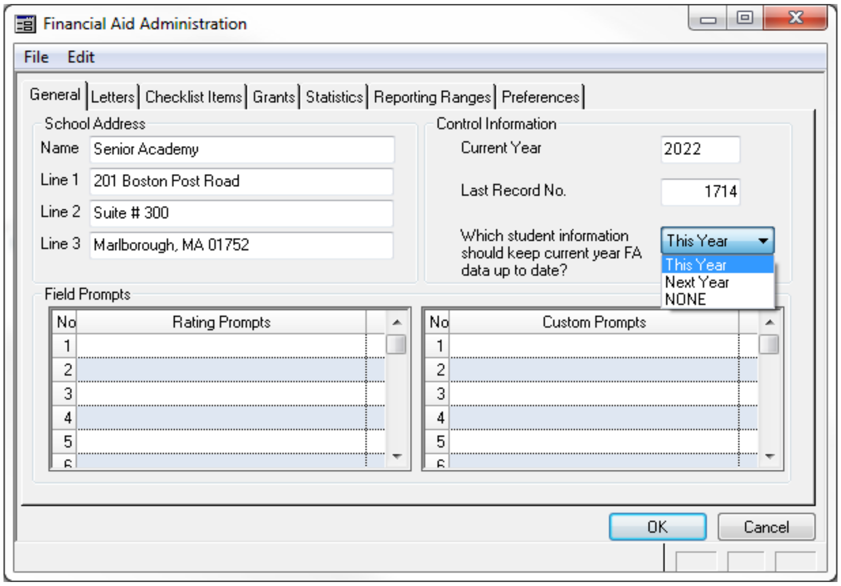


☐ You may want to run a global update to clear out section comments from the sections before starting the new school year.

☐ At some point prior to the start of the new school year, you will want to run **Discipline > Start New Discipline Period** from the Dean's Office application menu. This function resets infraction counts to zero, however student discipline records are not deleted and can still be accessed on the Student Discipline History screen by checking the 'Show accumulation of all discipline periods' option.

Financial Aid

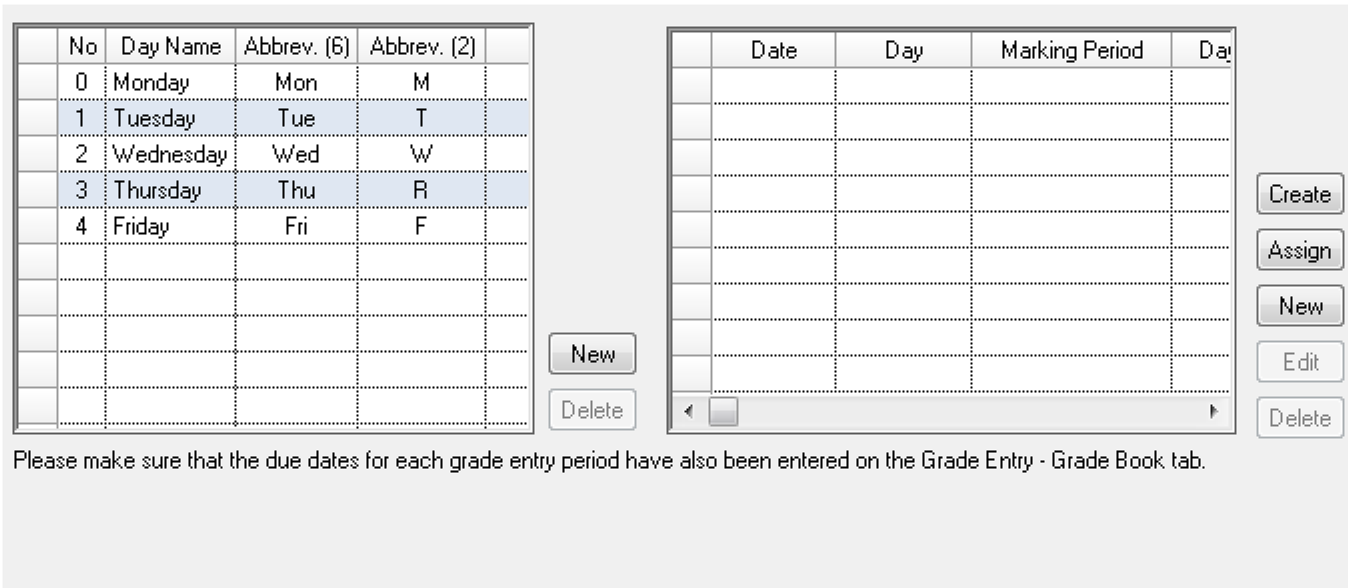
- [ ] Click **File** > **Administration Maintenance.** On the **General** tab, click the **Which student information should keep current year FA data up to date?** drop-down and select **This Year**.



How To Set Up the New Year Calendar

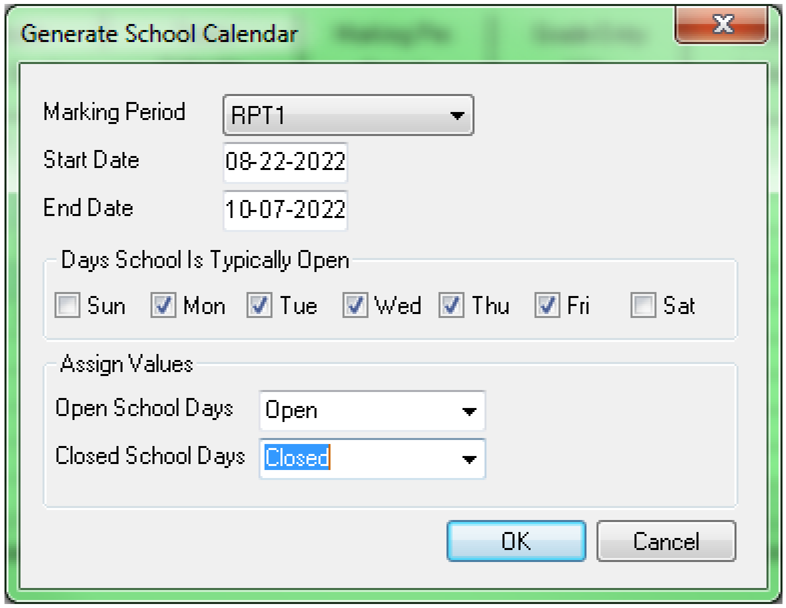
Follow these steps to set up your academic calendar for the new year:

1. In Registrar or Dean's Office, open the Calendar Tab in Administration Maintenance and confirm that the Days defined in the grid on the left-hand side of the window include all the days in your rotation.



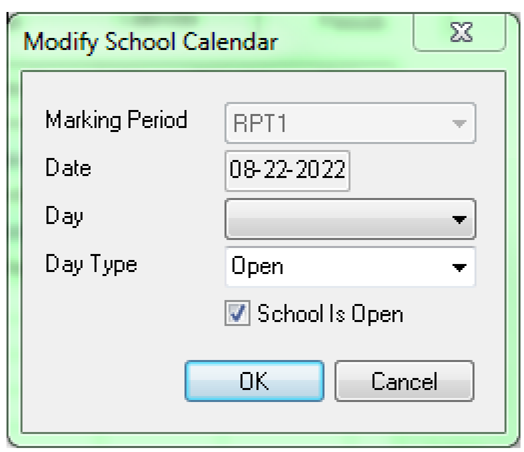
2. If the days are correct, click the **Create** button on the right-hand side of the window to create the Calendar Dates in each Marking Period.

3. Select the Marking Period you are creating Dates for and enter the Start and End Dates for the Marking Period. Check which days school is typically open (usually Monday – Friday) and select School Status Values for Open and Closed School Days, then click **OK**.



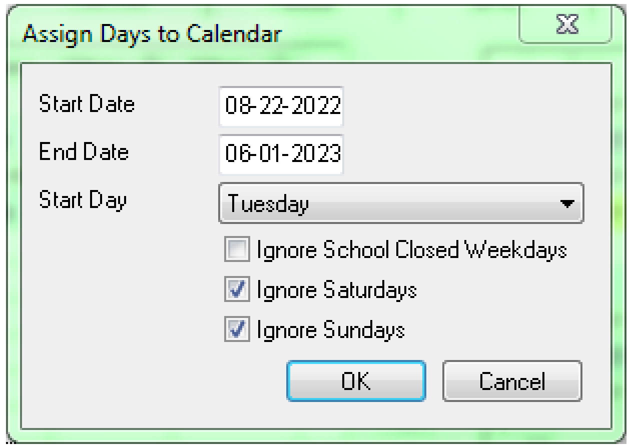
Note: The values for Open and Closed School Days (Day Types) will often simply be Open and Closed, but your school may customize these values to provide more information (eg. Holiday, Conference Day, Testing, etc.)

4. Once you've created the Calendar Dates, go through the Dates and double-click any Dates when school will be closed for Vacations, Holidays, Conference Days or any other reason. To indicate that school will be closed on that day, uncheck the 'School is Open' checkbox and click **OK**, after which you will notice that the Date is grayed out. The Day Type should be adjusted accordingly, but the 'School is Open' checkbox is the field that determines whether School will be considered Open or Closed on that date.



5. After you've created the Calendar Dates for all of your Marking Periods, and indicated when school is open

and closed, you'll need to Assign Day values to the Dates. Click the Assign button to Assign Days to the Calendar Dates you've Created.



6. The Assign Days to Calendar function will cycle through the Days defined in your Day Rotation and Assign Rotation Days to the Calendar Dates. Enter the Start and End Dates for the Dates you're Assigning Days to, and indicate which Day in your Rotation the first Date should be.

> **Note:**
> - IF YOU HAVE A MONDAY-FRIDAY 5-DAY ROTATION, you will likely want to UNCHECK 'Ignore School Closed Weekdays' and CHECK 'Ignore Saturdays' and 'Ignore Sundays'. This tells the program to Assign a Day to a Calendar Date during the week even if school is closed on that Date, insuring that the day of 'Tuesday' will be assigned to a Calendar Date that is a Tuesday, even if school was closed on the preceding Monday, for example. In other words, Days will be assigned to all weekday Dates, regardless of whether school is open or closed.
> - IF YOU HAVE A DAY ROTATION OTHER THAN MONDAY-FRIDAY, you will likely want to CHECK 'Ignore School Closed Weekdays', 'Ignore Saturdays' and 'Ignore Sundays'. This tells the program not to assign a Day to Dates when school is closed, so if a Monday is assigned 'Day A' and school is closed on Tuesday, Wednesday will be 'Day B' and no Day will be assigned to the Tuesday on which school was closed.

Click **OK** to Assign days based on your entries in this window.

If you use Daily Gradebook for My BackPack and you have set up gradebook templates, you will also need to move your templates to the new academic year using **Admin Community** > **Grading** > **Gradebook Template Maintenance** (or **Grading Setup/Tasks** > **Gradebook Templates**) so that teachers will be able to access them. (This is necessary to account for changes made to Administration Maintenance from year to year.) Select each division and then click **Move Templates To Current Academic Year** to re-activate the templates for the new school year. This should be done for each division that uses Daily Gradebook.

At some point prior to the start of the new school year, you will want to run **Discipline** > **Start New Discipline Period** from the Dean's Office application menu. This function resets infraction counts to zero, however student discipline records are not deleted and can still be accessed on the Student Discipline History screen by checking the **Show accumulation of all discipline periods** option.

IMPORTANT For any new students for the upcoming year that you transfer in from this point forward, you will need to manually edit their 'Next Year' information to make sure it is set correctly. Otherwise, these students will not advance correctly when you perform Student Grade Update next year!

IMPORTANT For any scheduling work that you do for the upcoming school year, you will now need to work with 'This Year' data, instead of 'Next Year' data, as you have been doing for the last few months. Be sure to change your default setting for each division.