

End-of-Year Process

**PowerSchool
Student Information System**



PowerSchool

Document Properties

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Introduction

The goal of this guide is to provide customers an outline and tools required to complete the end-of-year process in PowerSchool and prepare for the upcoming school year. This document describes PowerSchool's entire end-of-year process, including the procedures that must be performed before actually executing the end-of-year function.

You can also find much of the same information in PowerSchool Help, and some procedures below include references to other procedures in the onscreen help system. To access PowerSchool Help, click the Help icon  on any page in PowerSchool. Locate the appropriate procedure by using the alphabetical listing on the "A-Z Index" tab.

End-of-Year Process

The end-of-year process performs functions that “close out” the school year once it is over. It will perform this process for all students in all schools on your server, not just for students in the currently selected school, and is irreversible. The End-of-year process will:

- Promote all students at all schools on this system one grade level, and:
 - Promote students to their next school, according to the values entered in the `next_school_indicator` and `sched_nextyeargrade` fields for each student (**Note:** Pre-registered students are not promoted, instead, they are simply made active at their currently assigned grade level).
 - Graduate students at the top grade level
 - Move students from one school to another in multi-school environments according to each student's Next School Indicator field
 - Create new school enrollment records for each student
- For students moving to the Graduated Students school, it will also:
 - Store the current school name in the `graduated_schoolname` field
 - Store the current school ID in the `graduated_schoolid` field
- Set each student's exit date according to the last day of the school year for that school
- Carry forward lunch and fee balances and clear all financial lunch activity records, including:
 - Deleting all lunch transactions for all students and staff members
 - Moving the current lunch balances for students and staff into the previous balance field, and setting the current balance to \$0.00
 - Rolls fees over into the next year or zeroes out fee balances, depending on specified option
- Delete all records of parental web and telephone access to student records
- Delete bulletin items
- Delete transaction records for lunch, user logins, and user actions

The end-of-year process can impact your server's performance while it runs, and take a few hours to complete. It should be run when school is not in session, and few or no users are expected to access the system.

Prerequisites

There are several procedures you must complete before running the end-of-year process. Refer to the following sections for instructions on each procedure:

- Make an initial data backup.
- Correct and verify data.
- Make complete PowerSchool backups.
- Print student reports.

- Print school, district, and state reports.
- Clear non-essential fields.
- Enter data in the Next Grade Level and Next School Indicator fields.
- Complete scheduling.
- Make a final backup.
- Clear PowerGrade files.

Make a Backup of the Data File

The first important step is to perform an initial backup of your PowerSchool data file. Throughout the end-of-year process, you should make multiple backups of your PowerSchool data and application files as you modify any incorrect data, in order to quickly “undo” any erroneous changes.

Note: It is strongly suggested that you create a document to independently track changes as they are made to your data. Include all changes and indicate when backups are made so that if you are required to revert to a backup file, you will know which changes were in effect at the time each backup was made.

It is important to note the location of the backup files when you back up your data. After the backup is made, browse to that location and verify that the backup file was created properly.

How to Manually Back Up PowerSchool

PowerSchool saves backup files to default locations, if you have not defined a different destination for them. PowerSchool version 3.7.2 saves backups to the PowerSchool/systems/backups/ folder, while version 4.0.3 saves them to PowerSchool40/data/backup/powerschool/. For more information, see “Backups” in PowerSchool’s online help files, the District Administrator guide, or the School Administrator guide. All PowerSchool user guides are available for download at <https://www.powerschool.com/support/documentation/userguides/>.

1. On the start page, choose System from the main menu.
2. Click System Settings.
3. On the System Settings page, click Backup PowerSchool. The Confirm Backup page appears.

Confirm Backup

Please confirm you want to perform a backup of your PowerSchool server by pressing the submit button.

- Click Submit. The Alert page appears.



- Click the Back button to return to the administrative login page when the backup is complete. Note that the Alert page will neither refresh nor provide an indication of backup progress.

Correct and Verify Data

Two reports that are very useful when checking student enrollment information are the Enrollment by Grade and Enrollment by Section reports, including the "check for possible conflicts" function of each report. You should also consider having counselors and other staff members verify stored grade records and general student information.

How to Run the Enrollment by Grade Report

- On the start page, choose Reports from the main menu.
- On the Reports page, click Run Reports.
- On the Run Reports page, click "Enrollment by Grade." The "Enrollment by Grade" page appears.

Enrollment By Grade

Report Type
 Cumulative
 Year to Date
 Attendance Summary

School
 Apple Grove High School

Choose either Reporting Segment
 1 : 10/31/02 - 12/31/02
 Or
 Begin Date and Ending Date*

Grades
 9 10 11 12

Report by Track
 Track: _____ (comma separated)

Choose at least one program from the list below.

Special Programs
 DARE
 RAFT

[Check for possible Conflicts](#)

Display Audit Table
 Note: The audit table only displays numbers for the last grade level and special program listed.

Note: The Year To Date and Attendance Summary reports may take several minutes to complete.
 *Beginning and Ending Dates are valid only for the Attendance Summary Report.

4. Use the following table to enter information in the fields:

Field	Description
Report Type	Select the type of report: cumulative, year-to-date, or an attendance summary.
School	The name of the currently selected school appears here.
Reporting Segment	Use the drop-down menu to choose the reporting segment if you are not using a date range. For more information on reporting segments or to create a reporting segment, see the PowerSchool Help section "Reporting Segments."
Begin Date and Ending Date	Enter the date range to scan if you are not using reporting segments. For example, enter the first and last days of the school year or some smaller term.
Grades	Select the checkbox(es) for the grade levels to scan.
Report by Track	Select this checkbox and enter track letters if you want to filter the report by track.
Special Programs	Select checkboxes to scan desired special programs.
Display Audit Table	Select this checkbox to display the audit table, which includes the last grade and special program information.

5. Click Submit. The resulting report provides the attendance summary for the period specified. If your school is a year-round school, the Off Track column displays the number of days the student was off-track during the reporting period.

Attendance Summary By Grade												
Apple Grove High School												
Reporting Segment1: 10/31/2002 to 12/31/2002 = 38 school days												
Students not in												
Grade Level	Carry Fwd	Gain	Mult Gain	Loss	Ending	Actual Days	OffTrack	Days N/E	Days Absent	Days Attd	ADA	ADA %
10	11	0	0	10	1	418	0	210	0	208.00	5.47	100.00%
Subtotal	11	0	0	10	1	418	0	210	0	208.00	5.47	100.00%
Grand Total	11	0	0	10	1	418	0	210	0	208.00	5.47	100.00%
<p>To the best of my knowledge, the above attendance information is correct.</p> <p>Signed _____</p> <p>Date _____</p> <p>Report Calculations</p> <p>((Carry Fwd + Gain - Mult. Gain) X School Days) = Actual Days</p> <p>Actual Days - (Off Track + Days N/E + Days Absent) = Days Attd</p> <p>[Days Attd / (Actual Days - Off Track - Days N/E)] X 100 = ADA%</p> <p>[Note: Multiple gains are for students that entered more than one time during the report time span.</p>												

Proceed by printing the report from your web browser or saving it to another application. For more information, see the PowerSchool Help section "Run, Print, and Save Reports."

How to Run the Enrollment by Section Report

This report provides enrollment statistics for class sections. To report on class size, see the section "How to Run the Enrollment by Section (Class Size) Report."

1. On the start page, choose Reports from the main menu.
2. On the Reports page, click Run Reports.
3. On the Run Reports page, click "Enrollment by Section." The "Enrollment by Section" page appears.

Enrollment by Section

School: Apple Grove High School

Term (Term Begin Date): 02-03 Quarter 1 (8/28/2002)

Choose either Reporting Segment Or Begin Date and Ending Date:

1 : 10/31/02 - 12/31/02
 1/01/2002 | 9/10/2002

Sort By: Course Name Teacher Name

Course Numbers (comma-separated): 1031

Exclude Include

Section Numbers* (comma-separated):

[Check for possible conflicts](#)

Note: This operation may take 30 seconds per section to complete. If Begin and End dates are left blank, the term begin and end dates for the term are used.

4. Use the following table to enter information in the fields:

Field	Description
School	The name of the currently selected school appears here.
Term	The name of the currently selected term appears here.
Reporting Segment	Use the pop-up menu to choose the reporting segment if you are not using a date range. For more information on reporting segments or to create a reporting segment, see the PowerSchool Help section "Reporting Segments."
Begin Date and Ending Date	Enter the date range to scan if you are not using reporting segments. For example, enter the first and last days of the school year or some smaller term.
Sort By	The report output can be sorted by either course or teacher name.
Course Numbers	Enter the course number(s). Separate multiple course numbers with commas. If no course numbers are entered, all courses will be scanned.
Section Numbers	Select the option to exclude or include any sections. Enter the section number(s) to be included or excluded. Separate multiple section numbers with commas. If no section numbers are entered, all sections will be scanned.

- Click Submit. The resulting report displays enrollment statistics and their totals.

Enrollment by Section																Apple Grove High School	
1/1/02 to 9/10/02 - 170 days																	
Teacher	Course Name	Sec Num	Grade	BE Begin Emnt.	E Entries	WD With-drawals	EE End Emnt.	EP Emnt. for period	ED Emnt. to Date	AA Agg. Days Attend.	AY Avg. Days Attend.	DA Days Absent	DOT Days Off Track	DT Tot. Days Not Enrolled	AB Agg. Days Belonging (Member-ship)	AG Avg Num Belonging	P Percent
Allphin, Timothy	Algebra 1	02	<	0	19	0	19	19	19	3230	19	0	0	3211	3230	19	100
Totals				0	19	0	19	19	19	3230	19	0	0	3211	3230	19	100

Proceed by printing the report from your web browser or saving it to another application. For more information, see the PowerSchool Help section "Run, Print, and Save Reports."

Verify Default Grade Levels for FTEs

Check that next year's FTE "Default for these Grades" values are defined for all grade levels at all the schools on your server.

FTEs must be properly set up for the next year at all the schools on your server. All grade levels at all schools must be associated with an FTE, or students may not be assigned a new FTE when the End of Year process runs. If a grade level is not associated with an FTE when the End of Year process runs, students moved into that grade level, either within the school or coming from another school, will not receive an FTE for the upcoming school year and will need to have one assigned manually.

The "New FTE" and "Edit FTE" pages have checkboxes for "Default for these Grades". When a new FTE is created, these boxes are always unchecked by default. Although names of FTEs in different years may be the same, they are actually unique for each school year. If a grade level is associated with an existing FTE when a new school year is created, the same grade levels will remain associated with that existing FTE in the new year. Existing FTEs are automatically copied over to a newly-created school year.

Name	FTE Value: 1
Default Attendance Mode	Meeting
Default Attendance Conversion	Period to Day
Description	Basic FTE for all students.
Default for these grades	<input checked="" type="checkbox"/> 9 <input checked="" type="checkbox"/> 10 <input checked="" type="checkbox"/> 11 <input checked="" type="checkbox"/> 12

Make a Complete Backup of the PowerSchool Folder

Make a copy of the entire PowerSchool folder on your server so that you can restore the application to the exact state it was in prior to making any changes to your data or performing the end-of-year process, if it later becomes necessary. These complete backups can also be useful if your school is audited after you have run the end-of-year process.

Included in the PowerSchool folder are both the PowerSchool and PowerGrade backup folders. Encourage teachers to make a final PowerGrade backup as you prepare for the end of the school year.

On your PowerSchool server, copy the entire PowerSchool folder to another location, preferably onto a separate physical medium, such as a CD, DVD, or another hard disk. Depending on the destination of this backup, it may be necessary to make a compressed archive of the folder before copying it.

Print Student Reports

Print any reports you might need, such as report cards, transcripts, and form letters. For example, print copies or save PDF files of your school's transcripts for this year's graduates.

Note: Some items, such as class rank, cannot be recalculated for students once they have been moved to the Graduated Students school. Ensure that you print and back up appropriate information as described above before running the end-of-year process.

Produce PDF's of and verify student reports for the current year. If corrections are made, make a new backup of the data file and note which changes were applied.

Print School, District, and State Reports

Run all school, district, and state reports and make any necessary corrections or additions before running the end-of-year process. Other reports you may want to copy or print include those concerning teacher gradebooks, attendance audits, and ADA/ADM. These reports can be very helpful for auditors, even if they are not explicitly required at your school. Additionally, print any available state reports, regardless of when they are due to be submitted to the state.

You may want to print or export the final lunch balances for students and faculty, though this information is carried forward by the end-of-year process. Also, since the end-of-year process removes all parent and student login information, you may want to print the Parent Access report.

As usual, any changes to the data should be noted, and the corrected data verified.

Note: If you make changes to student data, it is critical that you make backups that have the same results as any printed reports.

Clear Non-Essential Fields

Determine which student fields are not essential and clear the values of those fields. For example, the student Activities field may not be essential since many students' activities, such as basketball, do not carry over from year to year. Therefore, you need to clear the values in these fields at the end of each year. Your school may also have defined custom fields that hold values that do not carry over from one year to another.

How to Clear Non-Essential Fields

1. On the start page, select the group of students.

Note: Depending on the selection method you used, the Group Functions page appears either immediately or after selecting students from the Student Selection page. If the Student Selection page appears, choose the function in the next step from the group functions pop-up menu.

2. Click Quick Export.

3. On the Quick Export page, export the student_number field and any non-essential fields.
4. Use a spreadsheet program to open the exported file.
5. Clear the values of all fields except student_number and the column headings.
6. On the start page, choose Special Functions from the main menu.
7. On the Special Functions page, click Importing & Exporting.
8. On the Importing & Exporting page, click Quick Import.
9. On the Quick Import page, import the previously exported file. The non-essential fields are now blank for all active students.

Note: Consider repeating this procedure while logged in to the district office to clear fields for all schools. Also, consider including inactive students in the student selection.

Complete Scheduling

Though it is possible to perform the end-of-year process without a complete schedule for the following school year, it is strongly recommended that you complete scheduling for students attending during the next school year.

Note: You must define the first and last days of school before running the end-of-year process. For more information, see the PowerSchool Help section "Schedule Years and Terms."

How to Know Your Student Schedules are Complete

The following is a checklist you can use to be sure that your student schedules are complete:

- You built a master schedule.
- You worked on conflicts, identified patterns, and corrected problems.
- You updated your master schedule.
- You optimized your master schedule. (optional)
- You ran a load.
- You checked your balances.
- You accommodated all student course requests. (optional)
- You reloaded and made any manual adjustments.
- Your balances are satisfactory.
- Your teacher schedules are satisfactory.

Set Next Indicators

Before running the end-of-year process, it is critical that you set the Next School Indicator field for all students. PowerSchool automatically sets students' next year grade levels.

By default, each student's Next Grade Level Indicator field is set to one grade level higher than the current grade level. Use the Scheduling Setup Screen on an individual student's page to either promote a student that is graduating early or hold him or her back. For example, in the latter case, the grade level for next year is the same as the grade level for this year.

Students in the highest grade level among all the schools on your server will automatically have their next grade level set to "99". PowerSchool uses this number to indicate that these students are finished with school and should be moved to the Graduated Students school.

How to Change a Next School Indicator

If you have not done so already, choose a default next school on the Next School page (School Setup > Next School). This saves you from having to display each student record to mark the student's next school. If all schools on the server use PowerScheduler to create enrollments, next school indicators should already be set for all students.

If you do not use PowerScheduler for a given school, you must indicate which students will attend your school next year. The school you select determines from which student course request pages the students will make their selections.

Suppose you work at a middle school that includes grades 9 through 12, and there is no higher grade level in your district. In order to include current eighth-graders at the middle school, who will be ninth-graders in the fall, change their next school to your school. The next school for the current year's twelfth-graders should be "Graduated students." Current ninth- through eleventh-graders will have their Next School Indicator set as their current school.

If a student's next school specifies another school on your PowerSchool system, his or her records are automatically moved to that school and the student is enrolled there. If a student's next school value is not set, PowerSchool uses the default next school specified for the student's current school.

1. On the start page, select the group of students.

Note: Depending on the selection method you used, the Group Functions page appears either immediately or after selecting students from the Student Selection page. If the Student Selection page appears, choose the function in the next step from the group functions pop-up menu.

2. Click Next School Indicator. The Next School Indicator page appears.



Next School Indicator - Apple Grove High School

Change the next school indicator for the currently selected 58 students to

JFK Jr. High School

Submit

3. Choose the default next school from the pop-up menu.
4. Click Submit.
5. Click Back after the Changes Recorded page appears.

Make a Final Data Backup

After verifying that the Next School Indicator values are set correctly for all students on the server, make another backup of your PowerSchool data file. For more information, see the section "[Make a Backup of the Data File](#)."

Clear PowerGrade Backup Files

Remove PowerGrade backup data files from your PowerSchool server. The default location for PowerGrade backup files for PowerSchool version 3.7.2 is a folder named "PowerGrade Backups" at the same folder level where PowerSchool is installed. Version 4.0.3 stores PowerGrade backup files in /PowerSchool40/data/backup/powergrade/. Be sure you backed up these files in the section "[Make a Complete Backup of the PowerSchool Folder](#)." Teachers must create new data files after you perform the end-of-year process.

End-of-Year Process

How to Complete the End-of-Year Process

Each school specifies a grade level that appears in the first column of the End-of-Year Process page; see the PowerSchool Help section "School Information" to change the grade level. Students at each school who are below this specified grade level remain at their current school and have their grade level increased by one. Students who are currently at or above this grade level in that school graduate. The graduating students' records are either moved to another school on this server or simply moved out of the current student status, depending on each student's next school.

If a student's next school is not set and the default next school is school number 999999, that student simply graduates and is not sent to another school. Typically, a high school sets its graduate grade level as 12 and its default next school as 999999, or Graduated Students.

If any of the graduate grade levels or default next school settings are not correct, see the PowerSchool Help section "Next School."

1. On the start page, choose System from the main menu.
2. Click "End-of-year process." The End-of-Year Process page appears.

School	School Number	(1) High Grade for each School	(2) Default Next School for Students in High Grade
1. Discordian High School	1733	12	999999
2. Moreau Vocational Technology Center	1657	12	999999
3. Jefferson Elementary School	1656	5	1657
4. Attendanceville Elementary	1732	5	1657
5. St. Lucifer Parochial School	1734	8	1657
6. York Elementary School	1697	5	1657
7. Graduated Students	999999	13	0

Type of student	Exit Code for Current Enrollment	Entry Code for New Enrollment	Exit Comment	Replace Existing Values?
Graduating	GR (Graduation)	N/A	Graduated	<input type="checkbox"/>
Promoted to next school	PR (Promoted to next year)	PR (Promoted from previous year)	Promoted Next School	<input type="checkbox"/>
Promoted within same school	PR (Promoted to next year)	PR (Promoted from previous year)	Promote Same School	<input type="checkbox"/>
Retained	RE (Retained in current grade level)	RE (Retained in current grade level)	Retained	<input type="checkbox"/>
Demoted	PL (Placed in grade)	PL (Placed in grade)	Demoted	<input type="checkbox"/>

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

Check here to confirm that you really want to do this.

Perform End-of-Year Processing

3. Choose appropriate values from the drop-down lists for exit and entry codes. Entry and exit codes are defined in District Setup.
4. Enter appropriate comments in the Exit Comment field for students who are graduating, promoted to the next grade level, retained in the same grade level, or demoted a grade level.
5. Choose whether to roll fee balances over into the new year, or to zero the current fee balances for all students. Note that balances that are rolled over into the next year are done as one lump transaction. Outstanding fee balances that are "zeroed out" are not deleted, they are simply not rolled over into the next school year.
6. Check the "Check here to confirm that you really want to do this" checkbox.
7. Click the Perform End-of-Year Processing button. The end-of-year process will begin.

After the process completes, verify that the information in the data file is correct. For example, be sure current eleventh graders were properly promoted to the twelfth grade level. Make another backup of the data file.

Prepare for the Upcoming School Year

The following is a list of tasks that you may want to perform in preparation for the upcoming school year. If you need to make any system-wide changes, such as modifying course numbers, this is a good time to perform those tasks. Many of these tasks are further explained in PowerSchool Help.

- Perform PowerGrade final grade setups at all schools on the server.
- Verify or create the calendar at all schools and adjust any attendance issues.
- Prepare for state reporting by entering any required information.
- Create custom pages or reports as needed.
- Evaluate what you can improve for next year and make a plan for implementing those improvements.
- Begin implementing a process for all teachers to create a new PowerGrade data file for the upcoming year, including the use of the PowerSchool/PowerGrade connectivity key.
- Make a final backup of the PowerSchool folder after completing all steps. Remove the backup from the server and store in a secure location.
- This is an ideal time to perform server tasks such as upgrading the server's operating system, installing additional memory, storage devices, and upgrading other hardware.

Appendix

End-of-Year Checklist

- Make a backup of the data file.
- Identify, correct, and verify student enrollment information by running the Enrollment by Grade and Enrollment by Section reports.
- Make a complete backup of your PowerSchool application and PowerSchool and PowerGrade data files.
- Print student reports:
 - Report cards
 - Transcripts
 - Form Letters
- Print school, district, and state reports:
 - Teacher Gradebook report
 - Attendance audits
 - ADA/ADM
 - State-specific reports
 - Other: _____
- Clear non-essential and transient student fields.
- Verify student Next Grade Level, Next School Indicator, and FTE values are correct.
- Complete scheduling.
- Make a final backup of the PowerSchool data file.
- Clear the server of PowerGrade backup files.
- Perform End-of-Year process.