End Of Year Rollover Checklist for Schools

Task	How to	Notes
Update Next School for all students, except the graduating Grade 12s and withdrawing students	Student List • Use the Pre-transition field set • Mass Update next school for students returning to the same school • Manually adjust this field for students that are not returning to the current school (out of district schools can be entered in the student details screen)	Run a separate query for students transtioning to a different next school than the current one. The *Next Year Student* filter will help determine next year enrollment numbers. **NextSkl > Name** Smithers Secondary Smithers Secondary For students transitioning to a new school, determine if there are programs, fees, lockers or transportation services that need to be closed off at the current school. Is the student enrolled in Student services, do they need to be exited?
Assign the next homeroom	• Use List Edit to propagate the Next Homeroom field if you know what they will be.	**NextHomeroom** **Next HR Teacher** MNKMAN Bvlurnn, B Tip! Matching the homerooms with the platoons will make elementary scheduling easier.
Identify students that will be withdrawing at the end of the school year.	Student List • Use the Pre-transition field set • Check if the student also needs to have fees, lockers, programs, transportation or student services terminated upon withdrawal.	If you know the next school, enter it in the NextSkl>Name field - do not check the withdraw checkbox, the students will automatically be withdrawn from the current school and admitted to the next school. Only check the withdraw checkbox for students who will not be active in a MyEducation BC school next year.
Identify students To be Graduated	Student List • Use the Pre-transition field set • Filter for YOG=current year • Use Mass Update or List Edit to update the "To be Graduated" flag	**To be Graduated** Y Y *Those Students with a current year YOG, the 'To be Graduated' flag set, and with an Active or Active no Primary status will be Withdrawn by EOYR with a code of Graduated – Dogwood. *Schools may choose to enter the Pre-Transition Withdrawal code of Completion – Evergreen for SCCP students.

Task	How to	Notes
Identify students that will not be graduating	Student List • Use the Pre-transition field set • Filter for YOG= year prior to current year • Use List Edit to uncheck the "to be Graduated" flag if set • Use List Edit on the Retain field if the student will be continuing in grade 12.	If the student is not graduating it is important to discern what the students plans are for next year. Will they be returning, will they be withdrawing? Will they be continuing in a DL school?
Update Dip/SCCP Date field	• Filter for students with the "to be Graduated" box checked. • Use Mass Update to insert the Diploma Granted/SCCP date that will appear on the PSR card.	You can continue to update these fields as information is available. Dip/SCCP Date 30/06/2017 30/06/2017 30/06/2017
Enter Pre-Transition Withdraw Code	• Select students withdrawing, graduating or moving to a new school and enter a Withdraw code as appropriate, if left blank EOYR will use the default Withdraw code.	• The default EOYR Withdraw code for graduating students is: Graduated – Dogwood • The default EOYR Withdraw code for students withdrawing or moving to a new MyEducation BC school is: From Previous School

Update Secondary school associations	• Use the Global top tab > Favorite > Student School Association > List to review and update end dates	• End dated
		  • On or before last calendar day of the enterprise year, will be ended at EOYR
		• Future end dated
		  • Post EOYR (Oct 26, 20XX)
		  • New SSA will be ended on the date chosen
		• No end date
		  • SSA is created for the new school year

Review Journal entries to determine which journal entries should be expired and deleted.	• Use the Global top tab > Student > Student Journal > List to review and update the Expiration Date field.	• Refer to school and/or district policy for guidance on what should be retained and what should be expired.
Review Student Programs	• Use the Global top tab > Favourites > Student Program Participation >List to review and update the End Date field.	• Refer to school and/or district policy for guidance when programs should be ended. Annually? Or upon withdrawal? • 1701 Student Services Designations should be left open for the receiving school's information

Task	How to	Notes
Review Conduct Incident entries to determine which should be expired and deleted.	• Conduct TT > Incident History ST > List use the Expiring Conduct Incidents field set. Review and update the Expiration Date field.	• Refer to school and/or district policy for direction on when incidents should be expired. Are all "bullying" incidents retained but all "cell phone misuse" expired?
Delete homerooms for students not returning	• Pre Transition field set, sort to the students not returning to the school, mass update to blank	• Students will remain in the homeroom if not removed
Exit students leaving the district from Student Services	• Please refer to the Inclusive Education Plans reference guide	• The EOYR process does not exit students from Student Services automatically
Check for active students with future enrollment dates and correct membership records as needed	• School or District view > Student Top Tab > filter: EOYR Future-Dated Enrollments	• The student membership records can be corrected by using one of the two options below: • A. If the student should be Active, change the Enrollment Date to a current date: • School > Student > Membership > Enrollment > Details of the most recent E record > change the date to a current date and save: ------ OR ------ • B. If the student should be PreReg, Change the status of the student to PreReg: • School > Student > Select Student > Options > Registration > Change Student Status to PreReg and save: • Note: Date entered must be on or after the latest enrollment date.

Task	How to	Notes
Ensure the build year has been setup at school level (For elementary schools, CE, CLC and SS)	• School View > School TT > Setup ST > Details Leaf	• In the details leaf, change the build year context > School year to the next school year. Click Save
Copy Course Catalogue to build year (For elementary schools, CE, CLC and SS)	• Schedule TT > Courses ST Filter: Build Year Options > Copy Course Catalogue	• When you filter for Build Year for the first time, there will no courses. • When you do options > copy course catalogue, it will open a pop up. **Copy from : Current school year** **Copy to: Next school year** You can use Replace Existing if you're executing this step multiple times in the event the number of courses have changed. **Courses : Copy All** • Click OK • The number of courses in the current year filter and build year filter should be the same.
Copy Active Schedule to Build View (For elementary schools, CE, CLC and SS)	• Build View > Scenario • Options > Copy Active Schedule	• You can name your scenario or by default it will name it as "Copy of (Current School Year) Active Schedule" • Items to include: **Only Master Schedule.** Note: Don't check any other boxes