



Yearly Process (EOY & SOY) Guide

Adapted from PowerSource articles #6181, #9497, #9498, and #9501 by Romy Backus

Directory of all EOY Resources: #344

Throughout this document, text in black is from the original article, text in **green** has been added by Romy

Update for PSUG SoCal: Text in **red** added by Roger Sprik

Preparing for the End-of-Year Process - Article # 9497

The End of Year (EOY) process closes out the current school year, and transfers students to their next year Schools/Grade Levels. **It applies to all schools on a server and cannot be run individually by school.**

This article details the steps (both required and recommended) to prepare for running the End of Year (EOY) process.

Make a Backup of your PowerSchool Data - **HIGHLY** Recommended

See "Manually Initiating a Datapump Export" in the version of the Oracle Backup and Restore guide for your version of PowerSchool.

PowerSource > Support > Documentation > Installation, Upgrade, Backup, and Configuration Guides > PowerSchool <version> Installation and Configuration Guides > Oracle Database Backup and Restore Guide for PowerSchool <version>

Make sure to review the export.log file in data_pump_dir for any errors.

It's a good idea to keep a datapump file from before each EOY process in a safe place (e.g. folder on PS server desktop) for the future. If you ever need to go back and access data from that year exactly as it was, you can restore the file to a test server.

Set Default Access Term Between School Years (Recommended)

There is a setting that tells the system what term a user should see by default when the system is between school years. If this is set incorrectly, your data could still be last year's but the system might be showing the upcoming school year as the default log in term, causing confusion. Best practice is to have this set to "Previous School Year" before EOY and "Next School Year" after EOY.

Setting is found under District - Miscellaneous - Default Term When Between School Years

Create Year Term For All Schools - Required

The date ranges for the year term are used to determine what the Entry and Exit dates for student school enrollments created by the EOY process.

At every school on your server, including Admissions if you have one, Graduated Students, and District Office:

1. Go to Start Page > School Setup (or District) > Years and Terms
2. Create the upcoming school year, **double and triple checking your start and end dates. Incorrect dates here will cause incorrect student enrollment start and end dates when the EOY process is run.**

Note: Many school setup items (Such as Attendance Preferences, Attendance Categories, Attendance Codes, Bell Schedules) are copied year-to-year when a school year is created this way. Create the upcoming year term at each school, even if the years and terms have already been created in PowerScheduler.

Check Next School Indicator Values - Required

The Next School Indicator (field: next_school) value for a student determines which school the EOY process will move the student to.

All active students must have a Next School Indicator assigned. **This can be done individually on the Scheduling Setup page, as a batch using the Next School Indicator function, or via Student Field Value or DDA. The actual value in the**

database for this field is always the internal PowerSchool schoolid, not the school's name, so keep this in mind if you are adjusting values manually (without a school name dropdown).

Graduating students should have a next school value of 999999 - this is standard across PowerSchool servers.

See PowerSource Article #11286 for detailed instructions.

Check Next Year Grade Indicator Values - Required

The Next Year Grade (field: `sched_nextyeargrade`) value for a student determines which grade level the EOY process will move the student to.

All active students must have a Next Year Grade value assigned.

Graduating students should have a next year grade value of 99 - this is standard across PowerSchool servers.

See PowerSource Article #11336 for detailed instructions.

Check Default Grade Levels for FTEs - Required

Full Time Equivalencies have checkboxes for every Grade Level at the school they are created at.

These boxes tell the End of Year Process which FTEs to assign to students based on their Next Year Grade Level

All FTEs should be reviewed, at all schools where students will be enrolled next year, to ensure these Checkboxes are checked for the correct FTEs/Grades

1. Navigate to: Start Page > School Setup > Full-Time Equivalencies (FTE) > [The name of the FTE]
2. Check the box for any Grade Level that should have this FTE automatically assigned to it by the EOY process

Permanently Store All Grades (Traditional Grading) - Recommended

Once you close out a year by running EOY, you will be unable to use Permanently Store Grades to store current grades from that year.

It is also good practice to export Historical Grades at the end of the year for archiving, however the EOY process does not touch any student grades, and they are already "archived" within the system in the StoredGrades table. If you have a datapump file that you can restore to a test server if necessary, this step is optional.

Validate School Enrollment Dates - Recommended

Run the following report and correct any students or enrollments that appear.

- Start Page > System Reports > School Enrollment Audit

What are School Enrollment Conflicts? School enrollment conflicts occur when the entry or exit date for one school enrollment overlaps the dates for another school enrollment, or extend beyond a valid set of scheduling terms (Years and Terms). To verify school enrollment dates, review current and previous enrollments on the Transfer Info student page. Current school enrollments are stored in the [Students] table and previous school enrollments are stored in the [ReEnrollments] table.

Validate Section Enrollment Dates - Recommended

Run the following report and correct any students or enrollments that appear.

- Start Page > System Reports > Section Enrollment Audit

What are Section Enrollment Conflicts? Section enrollment conflicts occur if a student's section enrollment dates do not fall within the entry and exit dates for a valid school enrollment or within the first and last day of a valid scheduling term (Years and Terms). Conflicts also occur if a student is enrolled in a school, but not enrolled in any classes. To review section enrollment dates, select the All Enrollments or Modify Info page for a student. Section enrollments are stored in the [CC] table.

Note: If you committed next year's schedule before running EOY, next year's class enrollments will appear in the class enrollment audit. This is normal and can be ignored.

Clean Up Any Other Bad Data with PowerTools - Recommended

Though not strictly necessary, the EOY process is a good time to do some housekeeping and clean up any other bad data, such as orphaned Attendance, shown in the PowerTools reports.

PowerTools can be downloaded from PowerSource Exchange.

Print out School Year Specific Reports - Recommended

Some reports will only return accurate results if run for the students most current school enrollment. It is better to be cautious, and print out any important reports for the year before you go through with EOY. It's also a good idea to archive these reports as historical backups for later.

Make sure you do this before withdrawing any students who are leaving over the summer, or your reports won't be accurate.

For a list that shows which reports will continue to be accurate for the concluded year if run after EOY, see PowerSource article # 9985.

Commit Schedule from PowerScheduler (or Copy Master Schedule on Live Side if applicable) - Recommended

Schools which use PowerScheduler should commit all student schedules before running the End of Year process.

NOTE: Your years & terms in PowerScheduler should match your live side dates for the new school year exactly! Committing the schedule overwrites the dates on the live side with the values in PowerScheduler, so double and triple check before committing.

If this cannot be done, see <https://support.powerschool.com/d/9687> for the steps necessary to use PowerScheduler after EOY is complete.

If you don't use PowerScheduler, you can use the Copy Master Schedule function either before or after the EOY Process.

Clear Student Activities - Recommended

All student activities are automatically carried over during the End of Year process.

Student activities can be cleared using the Clear Activities function at Start Page > System Administrator > Clear Activities. This needs to be done separately for each school on your server.

Meal Transactions (if applicable) - Recommended

The End of Year process clears all meal transaction records.

Prior to running the End of Year process, check in with your Lunch Staff and confirm they have completed all Meal Transaction Reporting for the year.

You may wish to export all records from the GLDetail table so the lunch staff can review this information after EOY.

Export BulletinItems, PhoneLogs, Logins, DBLog Tables - Optional

These tables are cleared as part of the EOY process, so if you want to keep a record of your bulletin items, of user logins, or of previous DDA modifications, export those records using DDA/DDE and keep them in an archive.

Withdraw Leaving Students/Staff - Recommended

Any students leaving over the summer should be transferred out of PowerSchool before the EOY process. This preserves them in their last active grade level and school, which is best practice for being able to find them again in the future. Graduating students are an exception to this since the EOY process will transfer them to the Graduated Students school automatically.

Note that students and their parents will no longer have access to the Parent/Student Portal once they are withdrawn or graduated.

Though staff do not have enrollment records in the same way that students do, it's also a good idea to deactivate any leaving staff members at this time.

Close Parent/Student Portal for Summer - Optional

Many schools like to close the Parent/Student portal over the summer while scheduling changes and other maintenance is carried out. In this past this required customization, but in PowerSchool 9 the ability to control access to the Parent/Student Portal is built in, as well the ability to add a "closed" message so users don't think something is wrong. It is also good practice to have as few users as possible in your system during the EOY process.

This function can be found under School - Parent/Student Pages, and must be done for each school individually.

Create Next Year's List of Standards - Optional

With the improved standards management in PowerSchool 9, a new features has been added to allow the creation of next year's standards list so that adjustments can be made for the upcoming school year without affecting the current school year's standards. This function is found under District - Standards - Manage Next Year. If this is not used, a copy of your current year's standards will be promoted to next year automatically as part of the EOY process.

Inform Other Users About EOY Process Timeframe - Optional

Since you want to have as few users as possible in the system when carrying out the process, it's a good idea to inform anyone who might be logging in in advance that they shouldn't be in the system at that time. Some PS Admins like to lock everybody except themselves out.

Capture Graduated Class Rank to custom field – Optional

Once your seniors graduate, you will lose their class rank. One solution is to capture their class rank to a custom field before processing EOY. You can create a custom field, it should be a text type, suggested name: "class_rank". Then before EOY export for your seniors student_number and the DAT for your class rank – example: ~>(*classrank method="VCHS" result="rankof") – then re-import into your custom field for use on reports and screens.

Running the End of Year Process - Article #9498

Now that all the preparation has been completed, we are ready to run the actual End of Year Process validation and process.

Set the District Office as your current school and navigate to Start Page > System Administrator > End-of-Year Process.

Default Next School - Required

Validate that each school is setup with a valid Default Next School for Students in the High Grade. For example, a high school is typically setup with a default next school of 999999 (Graduated Students).

Exit Codes - Required

Select an Exit Code for each type of student: Graduating, Promoted to next school, Promoted within same school, Retained, and Demoted. The End-of-Year Process will assign these Exit Codes to each student's current enrollment based on a comparison of each student's Next School Indicator, current school, Next Grade Level, and current grade level.

Entry Codes - Required

Select an Entry Code for each type of student: Graduating, Promoted to next school, Promoted within same school, Retained, and Demoted. The End-of-Year Process will assign these Entry Codes to each student's new/upcoming enrollment based on a comparison of each student's Next School Indicator, current school, Next Grade Level, and current grade level.

Exit Comments - Optional/Recommended

Enter an Exit Comment for each type of student: Graduating, Promoted to next school, Promoted within same school, Retained, and Demoted. The End-of-Year Process will assign these Exit Comments to each student's current enrollment based on a comparison of each student's Next School Indicator, current school, Next Grade Level, and current grade level.

Fee Transfer Method - Required

Select a fee transfer method. If the "Roll over the current balance" option is selected, any student with a non-zero balance for the current school year will be given a SOY (Start of Year) Balance in their fee transactions for the upcoming school year. If the "Zero the current balance" option is selected, students will start the upcoming school year with a zero balance for fee transactions. Note: This option does not affect student lunch balances.

Validation - Required

PowerSchool's End-of-Year Process includes a validation mode, during which the system will evaluate student, school, and district information for End-of-Year readiness. PowerSchool's End-of-Year Process will not run unless all students and schools are properly configured for transfers into the upcoming school year. To initiate the End-of-Year validation, use the dropdown to select one of the two validation options

*Perform EOY Validation

*Perform EOY Validation and make any students with the issue the current selection

Review and Correct Errors - Required

As the End-of-Year validation process runs, various student or school-related errors may be displayed on the screen. Review and correct any errors that appear. The validation process may be repeated multiple times to check your progress while correcting student setup or school setup data.

[PowerSource Article #9500 provides a list of common validation errors and how to fix them.](#)

Backup PowerSchool Data - Optional/Recommended

Once all validation errors have been corrected and the validation process no longer returns any errors, backup and archive your PowerSchool data file. Label this backup appropriately to indicate that all End-of-Year validation errors have been corrected. At this time, it is likely that no more changes are necessary before running the End-of-Year Process.

Verify Settings - Optional/Recommended

Verify that the Exit Codes, Entry Codes, Exit Comments, and Fee Transfer Method are still set as they were before running the validation process.

Disable SIF Agent - Required (if applicable)

If you are using the PowerSchool SIF agent to sync data, disable it at this time. Follow the instructions in the SIF Agent User Guide to do so.

Start the End-of-Year Process (Required)

Set the District Office as your current school and navigate back to Start Page > System Administrator > End-of-Year Process.

From the drop down select Perform EOY and Promote Students

"Click the "Perform End-of-Year Processing" button to initiate the End-of-Year Process. Be sure that the server is able to run uninterrupted (without being shut down) while this process runs through to completion (up to 4 hours).

Note: If any schools or students are improperly setup for the End-of-Year Process, PowerSchool will halt the process and return errors. These errors must be corrected before the End-of-Year Process can run.

End-of-Year Process Complete

As the End-of-Year Process runs, PowerSchool will display its progress on the screen. You can also see the progress on the PowerSchool Monitor on the server. The following message will be displayed in your browser once the End-of-Year Process is complete.

End-of-Year Process Complete

Backup PowerSchool Data (Optional/Recommended)

Once the End-of-Year Process is complete, create and archive another backup of your PowerSchool data file. Label this backup appropriately to indicate that the End-of-Year Process has been completed.

Re-enable SIF Agent - Required (if applicable)

If you are using the PowerSchool SIF agent to sync data, reenable it at this time. Follow the instructions in the SIF Agent User Guide to do so.

Post End-of-Year Tasks (Start-of-Year Setup) - Article #9501

After running the PowerSchool End of Year process, PowerSchool recommends reviewing various areas of the application to verify that the district and each school within the district is properly setup for the upcoming school year. This article describes several areas of the application that may need to be revisited after running the End of Year process but before starting the upcoming school year.

Years and Terms - Required

Verify that each school has the correct starting and ending dates for the school year on Start Page > School Setup > Years and Terms.

Verify Student Enrollments - Required

Verify that each student has the correct entry and exit date for the school year. The End of Year process assigns each student a start and end date based on your year term.

Periods - Required

Navigate to Start Page > School Setup > Periods and verify the number of periods for the upcoming school year at each school. Update the period names and abbreviations if necessary.

Cycle Days - Required

Navigate to Start Page > School Setup > Days and verify the number of cycle days for the upcoming school year at each school. Update the cycle day names and abbreviations if necessary.

Attendance Codes - Required

When creating a new year term, PowerSchool copies the attendance codes from the previous school year, eliminating the need to recreate attendance codes from scratch. If needed, attendance codes can be updated at each school on Start Page > School Setup > Attendance Codes.

Attendance Code Categories - Required

When creating a new year term, PowerSchool copies the attendance code categories from the previous school year, eliminating the need to recreate attendance code categories from scratch. If needed, attendance code categories can be updated at each school on Start Page > School Setup > Attendance Code Categories. Please note that in order for tardies to properly display on the Quick Lookup, each tardy attendance code must be associated to the Tardy attendance code category.

Attendance Conversions - Required

When creating a new year term, PowerSchool copies the attendance conversions from the previous school year, eliminating the need to recreate attendance conversions from scratch. If needed, attendance conversions can be updated at each school on Start Page > School Setup > Attendance Conversions.

Full Time Equivalencies (FTEs) - Required

When creating a new year term, PowerSchool copies the FTEs from the previous school year, eliminating the need to recreate FTEs from scratch. If needed, FTEs can be updated at each school on Start Page > School Setup > Full Time Equivalencies. Ensure that each FTE is assigned a default attendance mode and a default attendance conversion.

Attendance Preferences - Required

When creating a new year term, PowerSchool copies the attendance preferences from the previous school year, eliminating the need to redefine attendance preferences. Any changes to the attendance preferences at each school can be made at Start Page > School Setup > Attendance Preferences.

Bell Schedules - Required

When creating a new year term, PowerSchool copies the bell schedules from the previous school year, eliminating the need to recreate bell schedules from scratch. Bell schedules for each school can be modified on Start Page > School Setup > Bell Schedules. Verify that each bell schedule is assigned an attendance conversion method. Determine which periods will occur in each bell schedule. If using the meeting/daily attendance bridge, indicate which period is the bridge period in each bell schedule. Avoid enrolling students into overlapping periods.

Calendar - Required

Configure the school calendar at each school on Start Page > School Setup > Calendar Setup. Ensure that each in-session day is assigned a cycle day from the Day pop up menu, a bell schedule from the Schedule popup menu, and that the "in session" box is ticked.

This step is VERY IMPORTANT to perform accurately as soon as possible after EOY. The enrollment of students in classes depend on the bell schedule assignments and changing them later, or not having them set up at all, can cause all kinds of mess.

Final Grade Setup - Required

Ensure that your final grade store codes/reporting terms are properly setup at each school on Start Page > School Setup > Final Grade Setups. Final grade reporting terms are specific to the term in which they are created. For instance, a Q1 final grade reporting term setup for the Year term applies only to year long classes. This is different than the Q1 final grade reporting term setup for the Semester 1 term which only applies to Semester 1 classes.

Current Grade Display - Required

Update various grade display settings at each school on Start Page > School Setup > Current Grade Display. Here you can determine which final grades to display on the Quick Lookup, and whether to display current or historical grades. The Current Grade determines which store code is the current grade throughout the current school. The Parent/Student Access Term determines the data displayed in the public portal. Enter an appropriate term abbreviation. Your term abbreviations may or may not coincide with your final grade store codes.

GPA Student Screens - Required if applicable

Update various settings at each school on Start Page > School Setup > GPA Student Screens. Select a GPA calculation method from the pop up menu to determine the GPA displayed at the bottom of the Quick Lookup student screen. Update any data access tags (DATs) used for the Cumulative Info student screen. Some DATs on this page may have year or term-specific parameters which may need to be updated every year or every term.

GPA Calculations - Required if applicable

If your district uses GPA calculations with year-specific parameters or query options, ensure that your GPA calculations are updated with new parameters that pertain to the current school year.

Honor Roll methods - Required if applicable

If your school's honor roll methods use year-specific GPA calculations, ensure that the honor roll methods at each school are updated to use GPA calculations that are setup for the current school year.

Activities - Required if applicable

Create any new activities that will be offered in the upcoming school year. Activities can be created on Start Page > School Setup > Activities Setup. When specifying the field name of a new activity, ensure that you are using supported characters for a field name. PowerSchool supports letters, numbers, and the underscore (_). While other characters may be accepted by the application when creating the new activity, they may prevent students from properly enrolling in the activity.

Run Reset Class Counts Special Operation - Required

This step is VERY IMPORTANT. After the schedule has been committed and EOY process has been run, when looking at teacher schedules, PS Admins often panic when they see 0 enrollments in all classes. This has been a bug in PowerSchool for a very long time and can be easily solved by going to System - Special Operations - Reset Class Counts.

This special operation should be run frequently (daily is a good interval) from the EOY process until heavy scheduling has ceased (usually a few weeks after school starts) to keep the class counts as accurate as possible.

Since running a special operation is a small thing but usually requires system administrator access, there is a customization that adds the capability to run the operation to another page where secretaries or counselors have access to it: PowerSource Exchange Download ID #499

Adjust Default Term Between School Years - Required

This is the same setting we changed in the preparation - now it can be set to "Next School Year" so that your users' default login term matches the data.

Setting is found under District - Miscellaneous - Default Term When Between School Years

Re-enable Parent/Student Portal - Optional

Remove the login screen message and re-enable Parent/Student portal access.

New Student Setup - Required

At this time it's a good idea to import email addresses, assign Access ID & Passwords, and do whatever other setup is necessary for new students so that everything is ready for the beginning of the school year.

New Staff Entry/Setup - Required

Create and set up any new staff and their security permissions.

Inform Users that Data Is Correct For New School Year - Optional

Send an email out informing relevant users that EOY is complete.