

## Preparing for End of Year Rollover

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### Overview of End of Year/Beginning of New Year Activities:

1. In early spring, the eSchool team distributes letters with rollover dates at the Advisory Meeting.
2. March to May (or earlier) - District submits Next Year Scheduling Request Forms.
3. District maintains Next Year fields. When applicable, master schedule in current year and next year are kept in sync.
4. Before rollover, the district runs Cognos reports and Advanced Searches to verify data, especially Next Year fields. Any necessary updates are made.
5. By mid-June the district submits End of Year Mass Updates for NYS Reporting for 12<sup>th</sup> Graders.
6. Three business days before your rollover (earlier is preferred), the district submits End of Year Checklist.
7. After rollover, the district does Final Entry/Exit Download and Extract and other post-rollover tasks from End of Year Checklist.

### Documents & Forms Used to Communicate between the eSchool team and the District:

- Letters with rollover dates - Advisory meeting or follow-up email
- Next Year Scheduling Request Forms - **on website**
- End of Year Mass Updates for NYS Reporting for 12<sup>th</sup> Graders - **on website**
- eSchoolPlus End of Year Checklist - **on website**
- Instructions for Final Entry/Exit Download and Extract After Year End Rollover - **on website**

## **Detail of End of Year/Beginning of New Year Activities**

### **1. Rollover Dates - Distributed in early Spring**

### **2. District submits Next Year Scheduling Request Forms**

- One form can be submitted for all buildings. However, if buildings are being done at different times, multiple forms can be submitted.
- The eSchool team mass updates Next Year fields by overwriting whatever was there.
  - Next Year Building
  - Next Year Grade
  - Next Year Counselor (optional)
  - Next Year Primary Homeroom (optional)
  - Next Year Secondary Homeroom (optional)
  - Next Year House/Team (optional)

### 3. District maintains Next Year fields and keeps master schedules in sync

- At rollover, students will be given the Next Year Building, Grade, Counselor, Homeroom and House/Team fields. It is very important for the district to maintain the fields on this panel.
- Fields need to be maintained after Next Year Scheduling database is created **through the date of district's** rollover.
- **Often, once a building's Next Year Scheduling database has been created, the counselors begin adding course requests and creating next year schedules. Therefore, when a student's Next Year Building is changed, any scheduled courses need to be deleted or the student will remain scheduled in that building. This will cause them to take up seats and will cause the student to be on teachers' rosters on the first day of school. Course requests should be deleted at the same time to prevent potential errors. After rollover it is more difficult to delete scheduled courses. You will have to place the student back in the scheduling building to delete scheduled courses. Always delete next year course requests and schedules when you change a Next Year Building or when you withdraw a student.**
- To make changes to Next Year fields, go to the student's Registration page. From the Student Summary page, type "registration" in the Quick Search (or click on Registration > Entry & Reports > Student Demographic > Registration). There is a panel for Next Year fields.
- Once the scheduling database is created for next year, if any changes are made to the current year master schedule, they don't automatically update in next year's master schedule. **When applicable, master schedule in current year and next year should be kept in sync.**

#### Common Scenarios

- New student
  - Update Next Year fields during registration.
- Student leaves the district
  - Delete next year course requests and schedules if necessary.
  - Exit student as usual.
  - Change Next Year Building to your district's Unknown building. In most districts this is 999.
  - Delete other Next Year fields except Grade.
- Student is placed in an Out of District Placement Building
  - Delete next year course requests and schedules if necessary.
  - Update Next Year Building to the new building number.
  - Delete other Next Year fields except Grade.
- Student is retained in the same grade
  - Update next year course requests and schedules as necessary.
  - Change Next Year Grade (and other Next Year fields if necessary)
- Student registers before rollover - two choices:

- Enroll in school year in the district building with a preregistered status and an entry date no later than 6/30/XX. Verify Next Year fields. Students can be scheduled if you do this.
- Wait until after rollover and enroll students in the new school year as active, with an entry date of 7/1/XX or greater.

4. **Before rollover, district runs Cognos reports and Advanced Searches to verify data.**

**These should be run now so any errors can be corrected. They will also need to be run just before rollover to catch last minute errors.**

### **COGNOS Reports**

- **Registration Reports > Data Verification and Error Checks > Students Who Might be Setup Incorrectly for Rollover**

Prompts: Run for all status, all buildings, all grades.

Students will be on this report if their current Grade matches their Next Year Grade. Verify that this is the complete list of **students who will be retained** and that there are no extra students on this list. Students will be on this report if their current grade and Next Year Grade are atypical. Some of these may be correct and some may not. Students will also be on this report if their Next Year Building is illogical based on student status. This report will also flag a student if there is a mismatch between calendar and building. Correct errors as necessary.

- **Scheduling Reports > Student Information Reports > Students Withdrawn with Course Requests and/or Schedules**

If a student is withdrawn and still has a schedule, this will cause problems after rollover. The student will show up on the next year's class roster and a seat will be allocated to this student. It would be much more difficult to drop the schedule after rollover because they are no longer in a scheduling building. Drop the schedules for these students. It's a good idea to remove requests as well.

- **Registration Reports > Data Verification and Error Checks > Comparison of Current to Next Year Student Information**

Prompts: Run for Inactive students, all grades, all buildings; verify Next Year fields

Prompts: Run for Active students, one grade at a time; verify Next Year fields, especially Next Year Building when it should be different than the current building. Correct errors as necessary.

### **Advanced Searches**

- Help you ensure that your students rollover correctly.
- Some of these searches may produce reports that contain duplicate information to the Cognos Reports.
- May want to save for next year or publish for other users.
- Modify these examples to use codes specific to your district and use current school year.
- Modify List Field Selection in the examples below to fit your needs.

**Students who enter after Next Year Scheduling database is created.**

- You could review this data in the Cognos report “Comparison of Current to Next Year Student Information,” but can’t filter on Entry Date. Use whichever method you prefer.
- Make sure Next Year Building and Grade are correct; verify other Next Year fields if they’re being used.

**Search Criteria - Enter after 3/1/19**

**Advanced Search Criteria**

Actions	#	AND/OR	Area	Field Name	Condition	Value
	1		Entry/Withdrawal	Entry Date	>	03/01/2019
	2	AND				

**Criteria Grouping**

1

**List Field Selection**

Actions	#	Area	Field Name
	1	Demographic	Grade
	2	Next Year Demographic	Next Year Grade
	3	Demographic	Building
	4	Next Year Demographic	Next Year Building
	5	Demographic	Primary Homeroom
	6	Next Year Demographic	Next Year Primary Homeroom
	7	Demographic	Secondary Homeroom
	8	Next Year Demographic	Next Year Secondary Homeroom
	9	Demographic	Counselor
	10	Next Year Demographic	Next Year Counselor
	11		

## Students who exit during the school year.

- You could review this data in the Cognos report “Comparison of Current to Next Year Student Information.” Use whichever method you prefer.
- Delete next year course requests and schedules if applicable.
- Make sure Next Year Building and Grade are correct; delete other Next Year fields.
- At rollover, anyone who exits after the last session day will get a 6/30 end date.

Search Criteria - Withdraw during school year

Advanced Search Criteria

Actions	AND/OR	#	Area	Field Name	Condition	Value
<input type="checkbox"/>		1	Entry/Withdrawal	Withdrawal Date	>	07/01/2018
<input type="checkbox"/>	AND	2				

## Students that have the potential to rollover to Kindergarten

- This can also be done from the Cognos report “Comparison of Current to Next Year Student Information” if you prefer.
- Verify that Next Year fields are correct.
- For PreK Students, their Pre-K Programs will end as part of rollover unless specifically requested not to by the district.

**Search Criteria - Grades feeding Kindergarten**

Advanced Search Criteria

Actions	#	AND/OR	Area	Field Name	Condition	Value	
	1		Demographic	Grade	is in	<input type="checkbox"/> PA - PreK AM <input type="checkbox"/> PK - PK <input type="checkbox"/> PM - PreK PM	
		AND	2	Demographic	Current Status	=	Active
		AND	3				


Criteria Grouping

1 AND 2

List Field Selection

Actions	#	Area	Field Name
	1	Demographic	Building
	2	Demographic	Grade
	3	Next Year Demographic	Next Year Building
	4	Next Year Demographic	Next Year Grade
	5		

Enter grade level codes for PreSchool 4 and 5 yr. olds and Pre-K students.





## Students with a 4034 enrollment code - Preschool student enrolled solely for the purpose of determining CPSE eligibility

- You may want to print the ClearTrack PreSchool Enrollment Report. Check with your Special Ed department.
- Make sure Next Year Building and Grade are the same as current year Building and Grade until 8/31, regardless of whether or not they are receiving services during the summer.
- On September 1 the student can be entered into grade K in the building in which they will attend Kindergarten.

Search for students with entry code of 4034 and NO withdrawal code.

Actions	AND/OR	#	Area	Field Name	Condition	Value
[Icons]		1	Entry/Withdrawal	E/W School Year	=	2019 - 2019
[Icons]	AND	2	Entry/Withdrawal	Entry Code	=	4034 - Pre-school student enrolled solely for the purpose of determining CPSE eligibility
[Icons]	AND	3	Entry/Withdrawal	Withdrawal Code	is blank	
[Icons]	AND	4				

This is another way to search for your Pre-School students in evaluation.

Actions	AND/OR	#	Area	Field Name	Condition	Value
[Icons]		1	Entry/Withdrawal	E/W School Year	=	2019 - 2019
[Icons]	AND	2	Demographic	Building	=	991 - PreSchool Students in Evaluation
[Icons]	AND	3				

## Students with a 0055 enrollment code - Enrolled for Instructional Reporting Only

- Verify that these students have the correct Next Year Grade and Next Year Building. Talk to your registrar to determine what the Next Year Building should be. It is often the Unknown building.

**Search Criteria - 0055 Verification** Unsaved Search

Advanced Search Criteria

Actions	AND/OR	#	Area	Field Name	Condition	Value
		1	Entry/Withdrawal	Entry Code	=	0055 - Enrolled for Instructional Reporting Only
	AND	2	Entry/Withdrawal	E/W School Year	=	2019 - 2019
	AND	3				

Criteria Grouping  
1 AND 2

List Field Selection

Actions	#	Area	Field Name
	1	Demographic	Building
	2	Next Year Demographic	Next Year Building
	3	Demographic	Grade
	4	Next Year Demographic	Next Year Grade
	5		

Enter current school year

## Ungraded students


- Make sure the Next Year Grade is correct. For example, an ungraded student who is currently in 6<sup>th</sup> grade based on his birthday may be in K-6. His Next Year Grade may need to be set to 7-12.
- Verify that Next Year Building is correct.
- Any students exiting will need their Ungraded Program ended.

Use this search if your district uses Ungraded Grades:

**Search Criteria**

**Advanced Search Criteria**

Actions	AND/OR	#	Area	Field Name	Condition	Value
		1	Demographic	Current Status	=	Active
	AND	2	Demographic	Grade	is in	<input type="text" value="S1 - Ungraded K-6"/> <input type="text" value="S2 - Ungraded 7-12"/>
	AND	3				



Use your district's codes for ungraded grades K-6 and 7-12

Use this search if your district uses Ungraded Programs:

**Search Criteria - Ungraded Students Ungraded Program**

**Advanced Search Criteria**

Actions	AND/OR	#	Area	Field Name	Condition	Value
		1	NY Ungraded Program	Ungraded Grade	is in	<input type="text" value="13 - Ungraded 4-6"/> <input type="text" value="14 - Ungraded 7-12 - US"/>
	AND	2	Demographic	Current Status	=	Active
	AND	3	NY Ungraded Program	Ungraded Grade End Date	is blank	
	AND	4				

**Criteria Grouping**

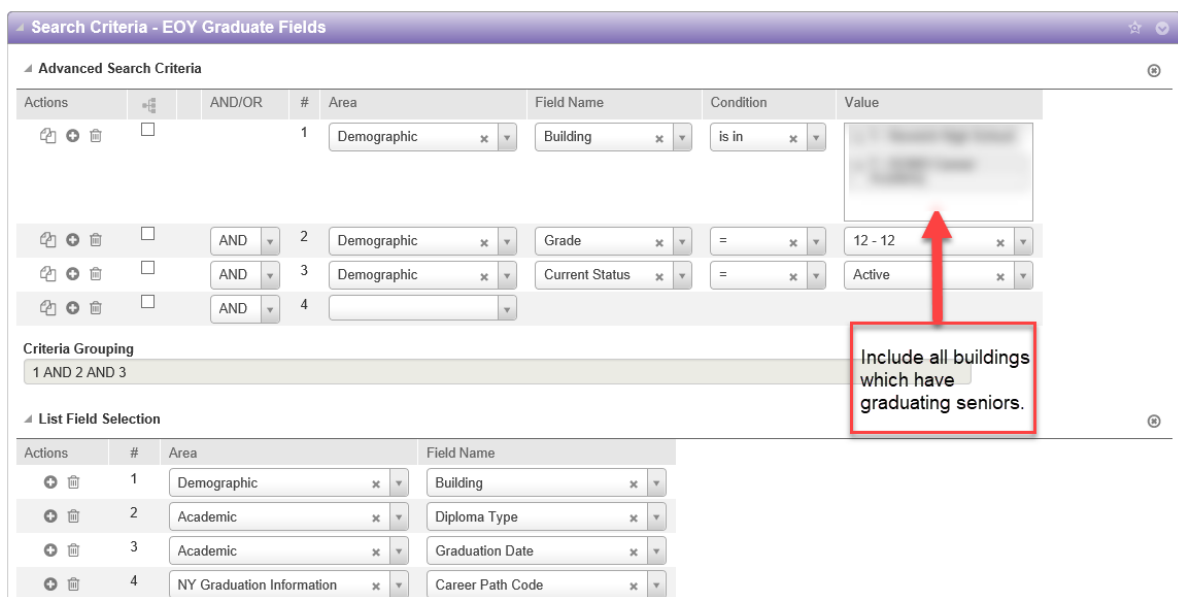
1 AND 2 AND 3

**List Field Selection**

Actions	#	Area	Field Name
	1	NY Ungraded Program	Ungraded Grade
	2		

## 5. NYS Reporting for 12<sup>th</sup> Graders

- End of Year Mass Updates for NYS Reporting for 12<sup>th</sup> Graders (form) is due to the eSchool team by June 17, 2020.
- In the 2019 school year, Expected Graduation Plans was a reportable field. Beginning in the 2020 school year, Expected Graduation Plans is no longer reportable.
- The eSchool team will mass update the fields as specified on the form.
- You will have to change the students who are exceptions. The updates can be done in June because the Level 0 edits for them are relaxed.
- Enter “Academic” in Quick Search. Update the following fields as needed:
  - Diploma Type
  - Graduation Date
- Enter “NY Graduation Information screen” in Quick Search. Update as needed:
  - Career Path Code
- Students who are graduating must have a Diploma Type AND Career Path Code or you will get an error in Level 0.
- When updates are completed, use this Advanced Search to verify the fields are correct. It will show the required NYS Reporting data elements for graduating 12<sup>th</sup> graders. They should not be blank if the student is graduating.



**Search Criteria - EOY Graduate Fields**

Advanced Search Criteria

Actions	AND/OR	#	Area	Field Name	Condition	Value
<input type="checkbox"/>		1	Demographic	Building	is in	
<input type="checkbox"/>	AND	2	Demographic	Grade	=	12 - 12
<input type="checkbox"/>	AND	3	Demographic	Current Status	=	Active
<input type="checkbox"/>	AND	4				

Criteria Grouping  
1 AND 2 AND 3

List Field Selection

Actions	#	Area	Field Name
<input type="checkbox"/>	1	Demographic	Building
<input type="checkbox"/>	2	Academic	Diploma Type
<input type="checkbox"/>	3	Academic	Graduation Date
<input type="checkbox"/>	4	NY Graduation Information	Career Path Code

Include all buildings which have graduating seniors.

### **Additional Notes for 12<sup>th</sup> Graders:**

- If a student doesn't graduate the district should delete these fields.
- 12<sup>th</sup> graders will be withdrawn by the eSchool team after all report cards have been completed for them. They will be inactive when we withdraw them. Rollover makes these students graduated.

- 6. eSchoolPlus End of Year Checklist** – Must be returned at least three business days before rollover. If you can get this to us earlier, that's preferred.

#### **First day of school**

The first day of school is entered as the course start date. If you schedule students and the first day of school changes, all course start dates must be changed or teachers won't be able to take attendance. This change must be done by one of our programmers and is very time consuming so it is much better to have an accurate date before scheduling (or as soon as possible).

- 7. Final Entry/Exit Download and Extract and other post-rollover tasks from End of Year Checklist**

ALL DISTRICTS need to do a final Entry Exit Download and Extract once their eSchoolPlus year-end rollover is complete. The help document for this is available on the eSchool website. Check the End of Year Checklist for additional Post-Rollover tasks.

### **Other Notes:**

#### **No Show**

When a student is a no-show you cannot just delete the entry withdrawal record if the student has an entry/withdrawal record in the previous year. You have to fix the prior year historical withdrawal record in level 0 historical OR withdraw as 7/2.

#### **Permanent Record Labels**

If you've received these in the past, you will receive an email asking if you would like to receive them again this year.