



Preparing for End of Year

The End of Year process is used to close out the current school year and transfer all students to the grade level and school that each will be attending during the upcoming school year. Several tasks should take place prior to running the PowerSchool End of Year process.

NOTE: PowerSchool recommends that you attempt this process **AFTER** the school year is finished AND all final grades for the year have been permanently stored.

To avoid unnecessary setup items, refer to Knowledgebase Article [9501](#) for a list of items that should be setup after running EOY.

1. **Backup PowerSchool Data (Optional/Recommended)** Backup and archive your PowerSchool data file. Preparation for the End of Year process may involve modifying many records in the PowerSchool database. Any erroneous changes may be undone by reverting to a data file backup.
2. **Validate Enrollment Dates (Optional/Recommended)** Validate section enrollment and school enrollment data using the Section Enrollment Audit report and the School Enrollment Audit report. These reports will help identify any entry and exit date discrepancies with section or school enrollments.
3. **Print Reports (Optional/Recommended) - Some Government Agencies Require ALL reports completed prior to running the EOY process** While many reports in PowerSchool can report on data from prior years, some reports are designed to report on current data only. After running the EOY process, it may be difficult to extract some historical data using certain reports. PowerSchool recommends that administrators print and archive the following reports for the current school year before running the EOY process: User Defined Reports (Object Reports, Report Cards, and Form Letters), State Reports, and Canned Reports.
4. **Years and Terms (Required)** Create the upcoming year term at each school, even if the years and terms have already been created in PowerScheduler. **Note:** When a user creates a new year term on the live side at an existing school, PowerSchool will copy attendance setup information from the previous school year into the new school year. This eliminates the need to recreate attendance codes, attendance code categories, attendance conversions, FTEs, and more. The school calendar is also generated when a year term is created. When running the End of Year process, PowerSchool uses the start and end dates of the upcoming school year to determine a student's new entry and exit date.
5. **Next School Indicator (Required)** The End of Year process uses the Next School Indicator to determine which school each student will attend in the upcoming school year. Set each student's Next School Indicator. This can be done individually on the Scheduling Setup student screen, or in groups by updating the Next_School field with an import, the Student Field Value group function, or DDA.
6. **Next Year Grade (Required)** The End of Year process uses the Next Year Grade value to determine which grade level a student will be enrolled in for the upcoming school year. Set each student's Next Year Grade before running the End of Year process. This can be done individually on the Scheduling Setup student screen, or in groups by updating the Sched_NextYearGrade field with an import, the Student Field Value group function, or DDA.
7. **Activities (Optional/Recommended)** All student activities are automatically carried over during the End of Year process. Clear any student activities that shouldn't carry over into the next school year. This task can be accomplished for groups of students using the Clear Activities function located at Start Page > System Administrator > Clear Activities.
8. **Default Grade Level for FTEs (Required)** Verify that each grade level has a default FTE for the upcoming school year. If a student transfers into a grade level that is not assigned a default FTE, the student will not be assigned an FTE for the upcoming school enrollment. To access the FTEs for the upcoming school year, select the upcoming school year from the Term menu then navigate to Start Page > School Setup > Full-Time Equivalencies (FTE).
9. **Scheduling (Optional/Recommended)** If using PowerScheduler, commit the schedule to the live side. The Scheduling process can be continued after running the End-of-Year process, but certain extra steps must be taken.
10. **PowerGrade Backup (Optional/Recommended)** Backup and archive the PowerGrade data files located on the PowerSchool server.
11. **Meal Transactions (Optional/Recommended)** When running the End of Year process, PowerSchool rolls over the student's current balance as the beginning balance and clears all meal transactions. By exporting the meal transactions from the GLDetail table this will allow the lunch staff to review historical lunch.
12. **Historical Grades (Optional/Recommended)** While the End of Year process does not modify or delete any stored grades, it is good practice to export this data at the end of each school year.

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