

Administrators – End of Year Tasks and Setup of New Year

These steps must be done in order between **June 9th** and **Aug 1st** for a smooth transition into the new school year. The topics are hyperlinked to help guide you through the process.

1. [Update Student Records](#)
2. [Update Permanent Record Reporting Fields](#)
3. [Load Traditional Grades](#)
4. [Archive Report Cards](#)
5. [Run Day Attendance](#)
6. [Archive Permanent Record Card](#)
7. [Save End of Year Attendance report](#)
8. [End of Year Progression](#)
9. [New School Year](#)
10. [Set Default Year, Terms and Teacher Access](#)
11. [Update Family Portal Default Year and Access](#)
12. [Scheduling- Copy Classes](#)
13. [Group Enrollment](#)
14. [Gradebook Setup- Copy Setup to Classes](#)

[https://www.nbshubhelp.com/FACTS_SIS/Training_Center/Administrative_Tasks/Checklist_End of Year Progression \(You must be logged into FACTS for this link to work\).](https://www.nbshubhelp.com/FACTS_SIS/Training_Center/Administrative_Tasks/Checklist_End_of_Year_Progression)

Update Student Records

Any student whose status (eg. withdrawn) or grade level (eg. retained) will change before the next school year must be updated prior to progressing.

- Go to main menu, select students.
- Search for the student that needs to be updated and click on the School Information tile.

Lee-Ann Albano

Contact
Address: 1 Sample Rd., Sample City, OH, 55555
Home: -- Mobile: --
Email: --

School Information
Current: Enrolled - 03
Next: Enrolled - 04

Student Information
DOB: 04/30/2012
ID: 10266
UID: 2555

Family Portal
Password Family Portal

Family
+ Add Family
Albano, Sample and Sample3
Sample Albano
Sample3 Albano

Attendance - Year
Year to Date
Present: 144.5
Tardy: 15
Absent: 14.5
Homeroom: 05 HR - A
Instructor: F 6
Code: --

Behavior
Year to Date
Ments: 0
Demerits: 0

Transcript
Cumulative
GPA: 0
UGPA: 0

Emergency Contacts | Pick Up

- On the left-hand side, you will see the current status and grade level and on the right you will see the projected labeled Next. If a student is withdrawing, you will change the Next Status to Withdrawn and remove the grade level.
- If the student is being retained (3rd grade reading guarantee), leave the next status the same, and change the Grade level on the right-hand side to the same grade level as what is on the left-hand side.

School

General Enrollment History Other Schools Lockers

Student School Records

Current School *
Bishop Flaget School

Current Status *
Enrolled

Grade Level
03

Sub Status

Configure

Placement

Student ID
10266

School UD ID
2555

Next School
Bishop Flaget School

Next Status
Enrolled

Grade Level
04

Enrolled Date *
2/6/2018

Graduation Date

Class Year

Withdraw Date

Withdraw Reason

Reenrollment Status
Finished

School Year
2022-2023

Academics
Advising
Alerts
Attendance
Behavior
Demographics
EC/PU Contacts
Email History
Family
Finance
Interests
Medical
P/T Conference
Portfolio
Religion
Report Card
Schedule
School

Update Permanent Record Reporting Fields

There are several fields that must be updated before archiving the permanent record cards.

Ohio State Reporting Fields

The OH state reporting fields are found in the User Defined section (bottom right) of the student profile under the group called OH State Reporting. Update the fields as it relates to the EdChoice scholarships (vouchers), Title 1 eligibility and economically disadvantaged status. This is where their state-issued SSID is entered as well.

Special Needs Fields

The Special Needs fields that need to be updated are found in the User Defined groups under the Special Needs group. Update the fields regarding special needs, including MFE and ETR dates and any services they receive.

Student Information Fields

The Student Information fields that need to be updated can be found in the Student Information group under the User Defined section. This is where the Extra-Curricular programs that the student is involved with is entered.

You can make batch edits by clicking on Grid Edit at the bottom, left-hand side of the screen. You select the students and the fields that need to be edited and update them all at once.

Staff Updates

There are two fields that must be updated in the Staff User Defined group called OH state reporting. Select a staff member and go to the User Defined sections, select the OH State Reporting group and update the days worked per year and the hours worked per day. This is used to determine ACR amounts. You can also use Grid Edit to do a mass update of these fields as well.

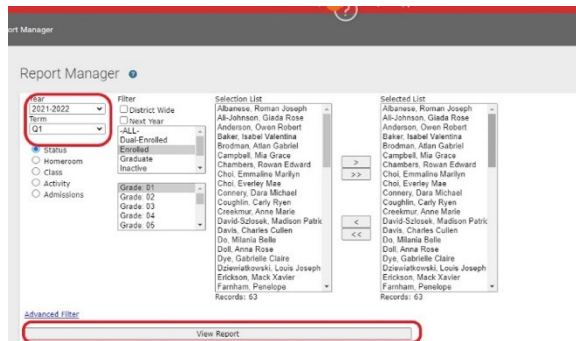
Load Traditional Grades

At this time, the teachers load their own standards-based grades from the gradebook but the traditional grades for Algebra 1 and Geometry must be loaded by the administrator. FACTS is working on an option for administrators to load standards-based grades as well.

- Go to System and click on Database Tasks.
- Click on Report Card Load.
- Select classes, and make sure the term selected is the last term of the year.
- Click on Load grades from Gradebook. You can also load comments, attendance, etc. as well.

Archive Report Cards

- To generate the report cards for archiving, go back to the hamburger menu at the top left and select **Report Manager**.
- Click **Academics** and select **Report Card (Web)**.
- Make sure that Q4 is selected.



- Select the students. You can select by grade level or select them all. Click **View Report**.
- Click **Archive Report Cards**.
- Select the template you have been using, **ColumbusDioc/ColumbusDioc_StandardsRC**, **ColumbusDioc/ColumbusDioc_StandardsRC_Spanish** or **ColumbusDioc/ColumbusDioc_StandardsRD_NoWH**.
- Click **Create Archive**.
- Click **Done**.
- To check if the archive was completed, go to Student's profile, click Portfolio and you should see the current school year's report card.

Run Day Attendance

Attendance will only display in the permanent record card correctly by running Day Attendance at the end of the year.

- From the hamburger menu, go to System > Database Tasks.
- Select the top option- End of Year Progression.
- Go to Step 2 and click Submit. When completed, you will see a green checkmark.
- Now you are ready to run the Permanent Records.

Archive Permanent Record Card

- To generate the permanent record card for archiving, go back to the hamburger menu at the top left and select **Report Manager**.
- Click **Academics** and select **Transcripts**.
- Select the students. You can select by grade level or select them all. Click **View Report**.
- Click **View** to review them and then click **Archive Transcripts** when you are satisfied they are correct and all fields are populated.

- Select the template, **ColumbusDioc/ColumbusDioc_PermanentRecord**.
- Underneath the Template field, you can go to Grade Levels and select all or single grade levels.
- Click **Create Archive**.
- Click **Done**.
- To check if the archive was completed, go to Student's profile, click Portfolio and you should see the current school year's permanent record card.

Save End of Year Attendance report

The End of year Attendance report must also be run and loaded into the Student Portfolio. At this time you must save and upload it; however, FACTS is going to rework the report so that we can also archive it in the same way as report cards and the Permanent Record Card, hopefully, by next school year.

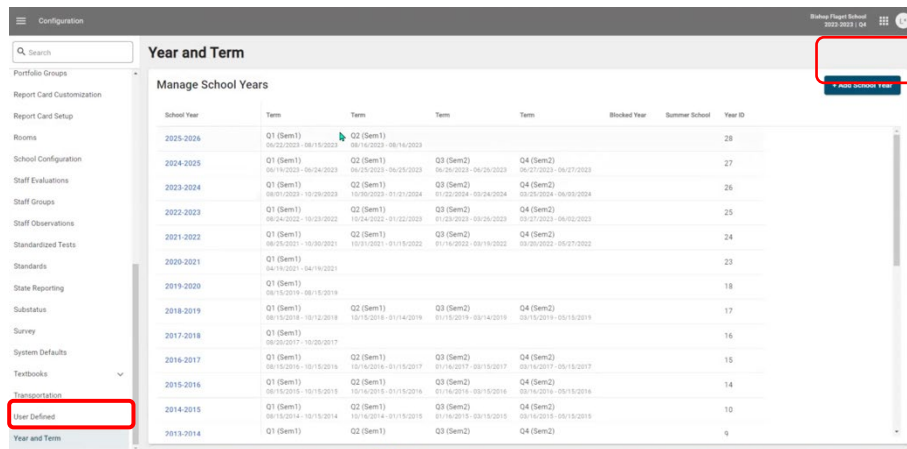
- Go to Report Manager and select Custom. This report was customized for the Diocese of Columbus.
- Select Diocese of Columbus: End of Year Attendance.
- Select students and click View Report.
- Right click on the report and choose Print. Set it to Save as PDF or you can print a hard copy and file it in the student files for the 2023/2024 school year.
- Upload it by going into the student profile, clicking on portfolio and clicking on Add File.

End of Year Progression

- Go to the hamburger menu and click on **System** and then **Database Tasks**.
- Select **End of Year Progression**.
- Print the Progression Error Check report (Step 1) and correct all errors. (See Error Check Warning list for more information. Reprint the Progression Error Check as many times as needed to correct all errors.
- Progress students to next grade level (Step 3). This can only be done once in a 9 month period so make sure you have completed all the above tasks.

Add New School Year and Terms

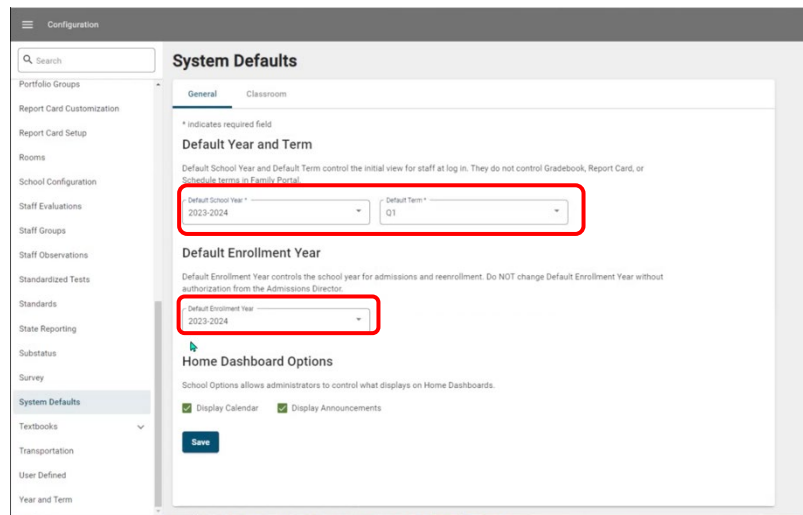
- Go to System>Configuration and click Year and Term. And then click Add School Year.



- You can block years from being seen by clicking Blocked Year.
- Add your terms and dates. If you are using quarters, make sure you are connecting them to Semesters 1 and 2. If you are using trimesters, connect them to Semester 1, 2 and 3.
- Click Add School Year at the bottom, right-hand side.

Set Default Year, Terms and Teacher Access

- Click on System Defaults from the Configuration menu.
- Change the Default School Year to the new school year and the Default Term to Q1 or T1.



- The Default Enrollment Year should already be set to the new school year since our schools open up enrollment no later than Jan. for the following year.
- Click Save.

- To control what the teachers can access, click on the Classroom tab at the top of the screen.

The screenshot shows the 'System Defaults' configuration page. On the left is a sidebar menu with various configuration options. The 'System Defaults' option is selected. The main content area has two tabs: 'General' and 'Classroom'. The 'Classroom' tab is active and highlighted with a red rectangle. Below the tabs, there are three sections: 'Default Year and Term' with dropdowns for 'Default School Year' (set to 2023-2024) and 'Default Term' (set to Q1); 'Default Enrollment Year' with a dropdown set to 2023-2024; and 'Home Dashboard Options' with checkboxes for 'Display Calendar' and 'Display Announcements', both of which are checked. A 'Save' button is at the bottom.

- Click the terms that you want teachers to have access to for both gradebook and report cards.

Update Family Portal Default Year and Access

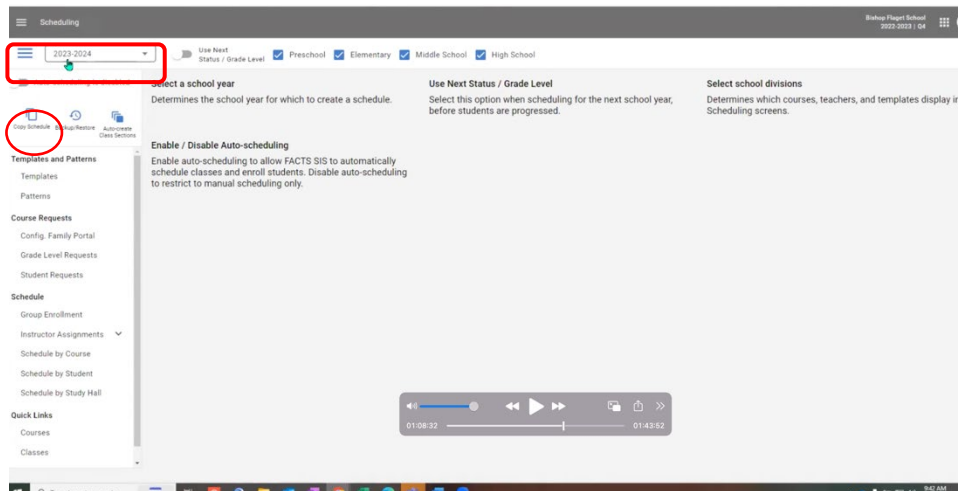
The Family Portal Default Year also needs to be changed to allow parents and students to view the information in their portal.

- Click on Family Portal from the main hamburger menu.
- Click and Select the Default year and the default gradebook term and report card term (Q2 or T1). Click Save.
- Select which items you want to hide. Suggestion, if you do not want parents to see classes and rosters, hide student schedules and class websites as a minimum. Another option is to wait to change the default year until you want them to see everything. IF YOU ARE A PREMIER SCHOOL, DO NOT TURN OFF "Allow Family Portal Access" OR HIDE ANY FINANCIAL SCREENS. Parents won't be able to access their financial screens to pay tuition or bills.

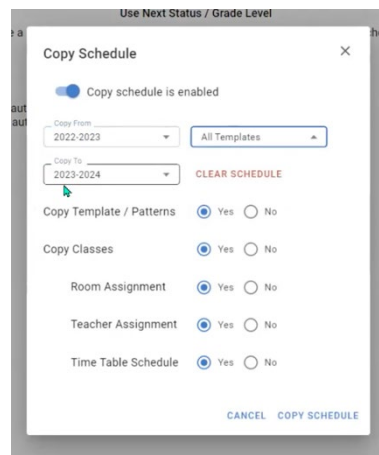
Scheduling- Copy Classes

The next step is to setup classes for the beginning of the school year.

- Go to the Scheduling section from the main hamburger menu.
- Select the year you are going to work in (new school year) at the top, left-hand side and click Copy Schedule.



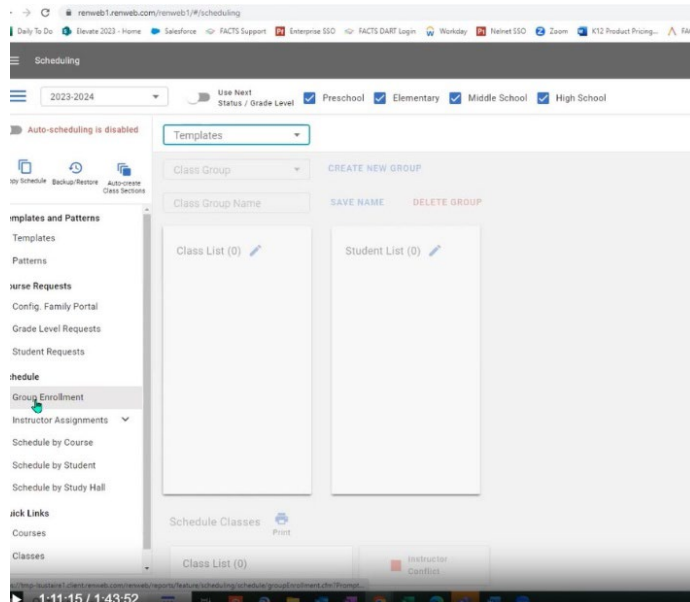
- Make sure you select last year's school year for Copy From and the new school year for the Copy To field.
- Copy All templates and all class information. Click Copy Schedule at the bottom.



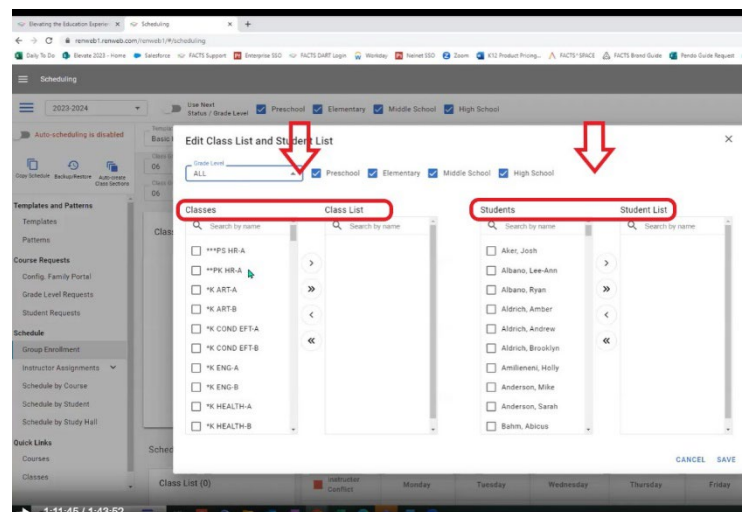
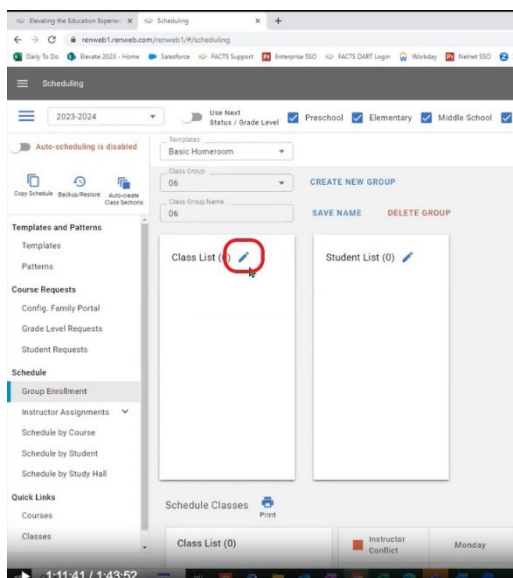
Group Enrollment

Group enrollment will allow you to roster your students and create class lists by grouping students into class groups and batch enrolling them.

- Click on Group Enrollment on the left-hand side of the Scheduling section.



- Select the template (eg. Homeroom)
- Click on Create a New Group.
- Enter the specific grade level for Class/Group Name. Click Save Name.
- Select the pencil icon. This will take you to a screen where you can select the classes on the left and students on the right.



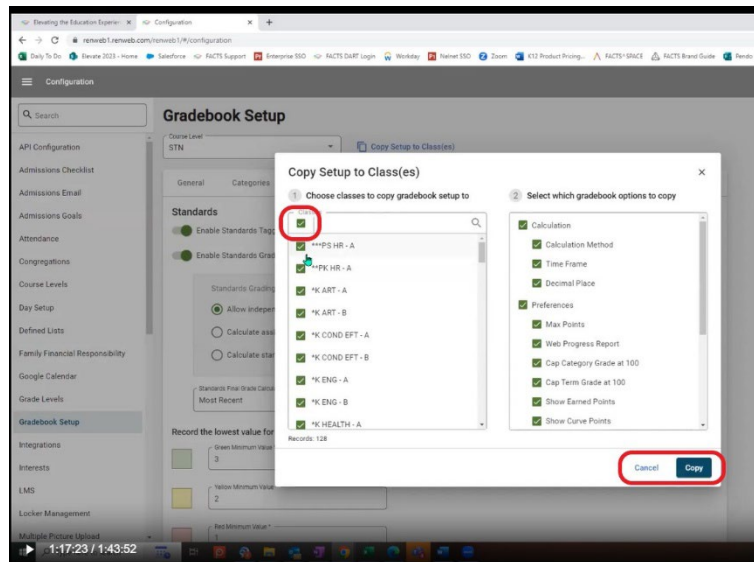
- Filter out the specific grade level at the top to make things easier. You can also enter the section code by the search icon to just copy the individual sections over. Use the single arrow to move over singular classes and the double arrow to bring all the grade level

classes over. You can do the same with the students. Click Save. The system has now enrolled the students into each of the selected classes.

- You can also scroll down and enter the classes into the scheduling template. The system will identify any instructor conflicts by highlighting them in red.
- To make changes, you can scroll down to the Quick Links on the left-hand side and click classes. Here you can select the class and add/change teachers, add sections, see the roster, etc.

Gradebook Setup- Copy Setup to Classes

- Go back to the main menu and click System>Configuration.
- Click on Gradebook Setup on the left-hand side.
- Select the course level: STN is for standards-based courses and REG are for the Algebra and Geometry courses that use traditional grading.
- You will need to copy both course levels over one at a time.
- You do not need to change any settings. Just click on Copy Setup to Class(es) found right beside the course level box.
- Click the box at the top to select all classes. Make sure everything on the right is checked. Click copy at the bottom of the screen.



This creates all the teachers' gradebooks and gets things ready for them to start adding assignments.

Other Reminders

- All student transfers between diocesan schools must be done globally for student records to transfer over with the student. Please contact Daphne with names, schools and grade level.
- Update [Family Portal Resource Documents](#) to remove old information, add new documents for next year.
- Update the [Graduation Date](#) for new seniors.
- Update any grade level-specific [communication groups](#) to reflect students' new grade levels.

