

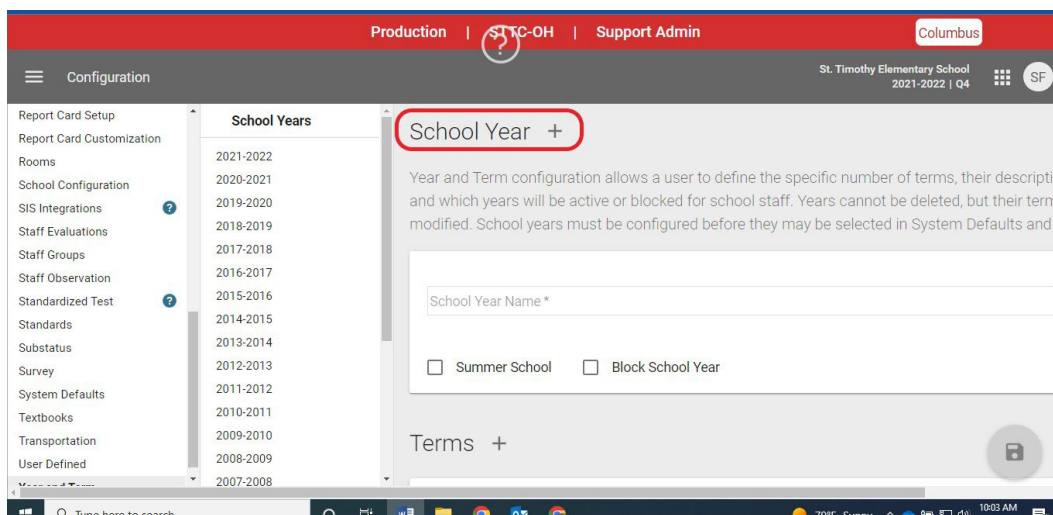
Administrators – End of Year Tasks

https://www.nbshubhelp.com/FACTS_SIS/Training_Center/Administrative_Tasks/Checklist_End_of_Year_Progression

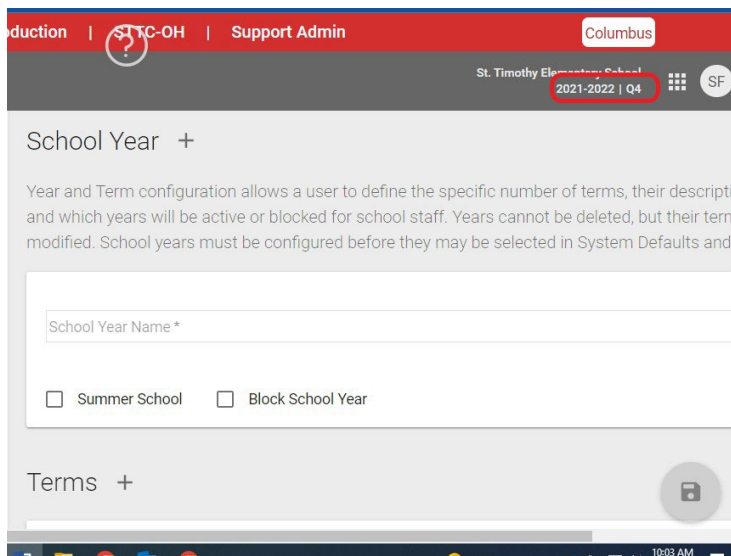
Before you start the process, make sure that:

1. A new school year has been created.

Go to System Configuration and click the + after School Year. Then do the same with the terms.



2. You are working in the school year that is ending.



- From FACTS SIS, click the menu bar (left-hand top)

- Click **System**, then click **Configuration**.

- Click **System Defaults**.

- Confirm the current (progress from) school year is selected as the **Default Year**. If the Default Year has been changed to the upcoming school year, select the current year from which to progress students in the drop-down list and click **Save**.

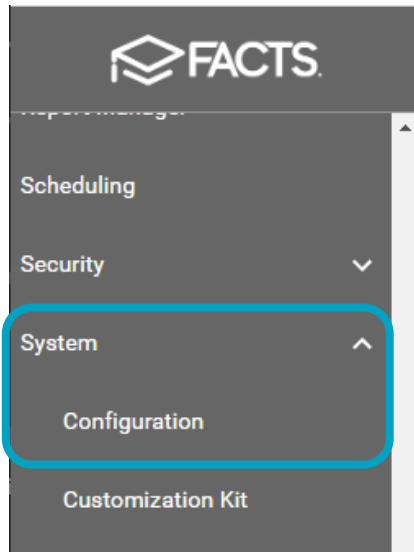
- Click **Close**.

Administrators – End of Year Process

1. Run Day Attendance

The first step is to make sure the attendance blanks in the system are converted to present codes. Attendance will only display in the permanent record card by running Day Attendance for each grade level at end of year.

- From the hamburger menu, go to System > Configuration.



- Select **Day Attendance**
- Select **Calendar Icon** under *Day Attendance column* on right for first grade.

A screenshot of the 'Day Attendance Configuration' page in the FACTS system. The page has a light grey header with 'Configuration', 'Codes', and a blue 'Day Attendance' button. Below the header, there is a section titled 'Day Attendance Configuration' with a brief description. A dropdown menu is set to 'Grade Level'. Below this is a table with columns: 'Grade Level', 'Attendance Method', 'Absence Full Day', 'Absence Half Day', and 'Day Attendance'. The 'Day Attendance' column contains calendar icons. The first row, for 'PS' (first grade), has its calendar icon highlighted with a red rounded rectangle. The other rows (PK, K, 01, 02, 03) also have calendar icons but are not highlighted.

- In new pop up screen **Create Day Attendance** go through following items:

Create Day Attendance

☒ Full Year
 ☐ By Term
 ☐ Date Range

Start Date * Wednesday, Aug 25, 2021
 End Date * Friday, May 27, 2022

☒ Skip Weekends and Holidays
☒ Treat 'No Attendance Marks' As Present

[Cancel](#)
[Create Day Attendance](#)

- Check box to toggle **Full Year**. *(Confirm **Start Date** and **End Date** are correct/adjust back if system has been progressed to new school year.)
- Toggle both options: **Skip Weekends and Holidays** and **Treat 'No Attendance Marks' As Present**
- Select **Create Day Attendance**
- Once saved, repeat steps with each additional grade level.

2. **Restrict Gradebook and Report Card Editing**

The next step is to lock the gradebooks and report cards so that they can't be edited.

- From FACTS SIS, click the hamburger menu bar (left-hand top)
- Click **System**, then click **Configuration**.
- Click **System Defaults**.
- Go down to Gradebook Editing and Report Card Editing and uncheck all terms.

3. Update Student Information

- Make sure you have updated student information by completing the **Grid Edit** for the Permanent Record Cards before you archive. The information will be pulled from the students' profiles and the record card will be blank if there is no data in the fields.
- Run any student reports that are specific to the current school year. Student records are not tied to years so you cannot retrieve past information such as current school roster or grade level reports.
- Print the Permanent Record card and final year report card to place in personnel files. Also print the end of year ACR, final attendance, enrollment history, and any other state reporting reports for your records.
- If you are using FACTS application and enrollment option, create reenrollment records and edit your enrollment packets.

4. Archive Report Cards

- Go to Report Manager.
- Select Custom on the right.
- Click on **Diocese of Columbus – Standards-Based Grades**. Click **View Report**. The following screen will display.

Diocese of Columbus – Standards-Based Grades

Re-Calculate Grade Book

This task will load grades from the Grade Book to the Report Card for all standards across all classes in your school. This task will also recalculate the Grade Book to omit Formative Categories (Zero-Weight) from impacting standards grades for the term.

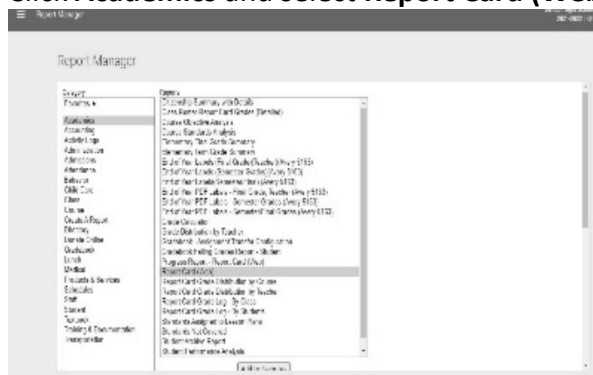
Load Standards Grades to Report Card

This task will calculate the Essential Standard grades and write those grades to their corresponding skill set. *Skills set grades that contain teacher initials in the comment section will not be overwritten.*

View Standards Hierarchy

Allows your admins to view the standards hierarchy across all grade levels and all courses.

- 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.

Report Manager

Year: 2021-2022
Term: Q4
Status: Enrolled
Grade: Grade 01

Selection List
Albanese, Roman Joseph
Al-Johnson, Glada Rose
Anderson, Owen Robert
Baker, Isabel Valentina
Bredman, Alan Gabriel
Campbell, Mia Grace
Chambers, Rouan Edward
Choi, Emmaline Marilyn
Choi, Everley Mae
Conney, Dara Michael
Coughlin, Carly Ryan
Creskumar, Anne Marie
David-Szlosek, Madison Patrick
Davis, Charles Cullen
De, Milana Bella
Dell, Anna Rose
Dye, Gabrielle Claire
Dziewiatkowski, Louis Joseph
Erickson, Mack Xavier
Fantham, Penelope
Records: 63

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Al-Johnson, Glada Rose
Anderson, Owen Robert
Baker, Isabel Valentina
Bredman, Alan Gabriel
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De, Milana Bella
Dell, Anna Rose
Dye, Gabrielle Claire
Dziewiatkowski, Louis Joseph
Erickson, Mack Xavier
Fantham, Penelope
Records: 63

View Report

- 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.

5. Archive Permanent record Cards/Transcripts

- 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 **Archive Transcripts**.
- 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.

6. Run 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 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.

- Save Day Attendance (optional)
- Progress students to next grade level

7. Configure areas for Next Year

- Update the [Default Year and Term](#) for the new school year.
- Update [Family Portal configuration](#) for default school and schedule years, and hide gradebook and report cards, if desired.
- 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.

You must be logged into FACTS for the hyperlinks to work. They contain additional instructions for the highlighted topics.