



MyEducationBC

End of Year Rollover

Reference Guide

May 2017 v5.2

Version History

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2.0	2-Jul-2015	Added Fees, Locker, and Transportation information
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3.1	10-May-2016	Updated student movement table with To be Graduated column, added YOG clarification for pre-admitted students. Updated pre transition field set to match current field set
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5.1	02-May-2017	Corrected typo in 2.4 movement scenarios
5.2	26-May-2017	Added section 2.8 Health Checks, Clarified status code for Graduate Seniors Process

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Table of Contents

1.0 INTRODUCTION.....	4
2.0 STUDENT MOVEMENT.....	4
2.1 Returning Students	4
2.2 Using the Pre-Transition Field Set.....	5
2.3 Graduating Students	6
2.4 Student Transferring Schools.....	7
2.5 Student Movement Scenarios	8
2.6 Student Secondary School Associations	9
2.7 Pre-Registered Students.....	9
2.8 Health Checks.....	10
3.0 OTHER TASKS	12
3.1 General Programs.....	12
3.2 Student Conduct Incidents	12
3.3 Student Journal Entries.....	13
3.4 Check Former School & Secondary School Association End Dates	14
3.5 Fees.....	15
3.6 Lockers	15
3.7 Transportation.....	15
3.8 User Accounts.....	16
4.0 STUDENT SERVICES	16

1.0 Introduction

End of Year Rollover has two parts that perform the following actions:

Graduate Seniors runs first:

- Graduates Active and Active no Primary students with a YOG in the current year and the 'to be graduated' indicator a status of Graduate and a withdrawal code of "Graduated - Dogwood".
 - These students will still have a grade of 12.

End of Year Rollover runs next:

- Students registered with a Pre-Reg status become Active.
- Moves students to their next school, creating a withdraw record for their current school and an entry record for the new school.
- Increases the YOG by +1 for students with the indicator 'RetainGrade' so they remain the same grade for the new school year.
- Withdraws students with the indicator Withdraw checked
- Assigns a new grade level based on YOG
- Ends or extends student secondary school associations (cross-enrollments), depending on the end date of the secondary school association.
- Ends Former school associations. Schools will no longer have access to students withdrawn from their schools in the previous year.
- Populates the student Homeroom with the Next Homeroom field if entered
- Deletes expired Journal and Conduct Incidents

2.0 Student Movement

2.1 Returning Students


Students who do not have a next school value will remain in the school, unless their Withdraw at EOY box has been checked. It is, however, recommended that schools assign a next school value if they know where the student is going to be in the new school year.

Assigning a next school value to these students facilitates the following:

- Makes the student available in the build view for next year scheduling
- New school can see designated students that are coming to their school.
- Causes students to appear in the Next Year Students filter for determining enrollment numbers.

2.2 Using the Pre-Transition Field Set

Remember:

- Values in many columns of the Pre-Transition field set are static and carry forward year after year. The values must be validated for accuracy for the coming End of Year Rollover. Schools/Districts may choose to mass update or delete the information prior to starting the Pre-Transition process.
 - Mass Update and Modify List functions can only be performed on Primary Active students. Set the filter to Primary Active Students if you intend to use these functions.
1. In the **School** view, select the **Student** top tab.
 2. Click the  icon and select the **Pre-Transition** field set.
 3. At this point, you have the ability to select individual students or query groups of students and use **Options > Mass Update** or **Options > Modify List**. If you are using mass update, ensure that you have the correct students selected for update. Current year values in this field set include: **Grade** and **GrSubLvl**, **EnrStatus**, **School>Name**, and **Homeroom**
 - a. **NextSkl > Name:** This field is populated for students transferring to another primary school for the next school year. Next School can also be populated for students who are staying in the school in order for them to appear in the next year student filters and the build view for scheduling.
 - The EOYR process will create a withdraw record from the current school and an enrollment record to the new school.
 - A new withdrawal and entry record will *not* be created for students with a next year value that are returning to their current school.
 - b. **Pre-transition Withdrawal Code:** Enter the Withdraw Code to be applied to the student if they are withdrawing or moving to a new Next School. If left blank, the Withdraw Code will default to: *To Next School* or *Graduated – Dogwood*
 - c. **Academic Track:** This field is used with online student course requests for next year. Contact the person managing online course requests in your school to determine who should be updating the field.
 - d. **NextHomeroom:** This field can be used for organizing students into homerooms for next year. If this field is populated the new homeroom will be assigned to the student as a part of the EOYR process.
 - e. **Next HR Teacher:** This information will populate automatically if a Next Homeroom value is assigned to a student. The corresponding value must be assigned to the teacher in staff details for the teacher name to appear.
 - f. **Diploma/SCCP Date:** This field can be populated for Grade 12 students who are graduating or students completion their Evergreen Certificate. This date is not used by EOYR, it prints on the PSR card Graduation Requirements Met field.
 - g. **RetainGrade*:** Checking this box indicates that the student is to be retained *in the same grade* and the EOYR process will add a year to the student YOG.

Note: This box does not mean the student will remain in your school – only that they will be retained in their current grade. The use of this checkbox would be rare in BC.

- h. **Withdraw***: Checking this box indicates that the student is to be withdrawn and is **not** transferring to an active MyEducation BC school through the EOYR process. Checking this box is not used for students who have a Next School value or for students with a current year YOG and set 'to be graduated'. *Note: If the withdraw box is checked for a student with a next school value, the student will transfer to the next school and then be withdrawn.*
- i. **To be Graduated***: To be graduated indicates a student is to be withdrawn with an enrolment status of Graduate (See Graduating Students section for other requirements). Uncheck this box for all grade 12 students who are not graduating.

* Only one of these settings may be used for a student at EOYR, and not all students will require one of these settings.

2.3 Graduating Students

There are three requirements for a student to be part of the Graduating Seniors process at EOYR:

1. Current year YOG
2. Status of Active or Active no Primary
3. "To be graduated" indicator checked

All students with a YOG in the current year, with an Active or Active No Primary status, and the 'to be graduated' indicator checked will have their status changed to Graduate with the withdraw code of Graduated - Dogwood. The status of Graduate is a Withdrawn status and functions the same way. The Withdraw code can be overridden by populating the Pre-transition Withdrawal code field, for example Completion – Evergreen may be used for students on the SCCP program of study.

Students remaining in grade 12 to complete course work should have the "RetainGrade" box checked and no 'withdraw' or 'to be graduated' box checked to have an Active enrollment status after EOYR.

The Graduate Seniors process does the following:

- Creates a withdrawal (W) enrollment record for the affected students' current school.
- Updates the students' withdraw code to "Graduated-Dogwood".
- Only updates Active and Active No Primary students with a YOG in the current year.
- Disables related user accounts.

Graduated students remain in the same primary school after EOYR in a Withdrawn state (the same as withdrawn students) with the status of Graduated and a Graduated-Dogwood code. No former school association is created for these students. **Next school values are removed for Graduating Students.**

Use the *Pre-Transition* field set to set the appropriate values for Grade 12 students:

1. In the **Query** menu, using the **Student Table** select **Year of graduation**
2. Set the **Operator** field to **Equals** and enter the **Current Year**.
3. Click **Add**.
4. Set the **Search based on** field to **Primary Active Students**.
4. Click **Submit**.
5. Use **Options > Mass Update** or **Options > Modify List** to assign appropriate values to Grade 12 students. If you are using Mass Update, ensure that the intention is to update all the records in the list before proceeding.
 - a. **NextSkl > Name**: Only populate for a grade 12 student who is moving to another primary school next year.
 - b. **Next Homeroom**: Not applicable to grade 12 students who are graduating.
 - c. **Next HR Teacher**: Not applicable to grade 12 students who are graduating.
 - d. **Diploma/SCCP Date**: This field can be populated for Grade 12 students who are graduating or students completing their Evergreen Certification. This date prints on the PSR card for Graduation Requirements Met. There may be students in the list who already have a date populated and have returned to take additional courses. If the mass update function is being used, click on the *Diploma Granted Date* header twice to sort any populated fields to the top. These records can then be omitted from any mass update by selecting the checkbox beside the records and using **Options > Omit Selected**.
 - e. **RetainGrade***: Check this box only if the Grade 12 student is to be retained in the same grade and the EOYR process will add a year to the student YOG.
 - f. **Withdraw***: Checking this box is not necessary for students who are in Grade 12 and are graduating, the 'to be graduated' checkbox is also a withdrawal.
 - g. **To be Graduated***: Check this box for all graduating students not returning or continuing in another school.

* Only one of these settings may be used for a student at EOYR, and not all students will require one of these settings.

2.4 Student Transferring Schools

EOYR performs the following actions for students moving to a new school:

- Creates a withdrawal (W) enrollment record for students' current school.
- Creates an entry (E) enrollment record for the students' next school, or current school if they are remaining in the same school in a different grade level.

Note: The Next School value will remain after EOYR. It is suggested these values be cleared out as a post-EOYR/School Startup activity.

2.5 Student Movement Scenarios

Student Movement	Next School	Diploma Granted Date	Only <u>one</u> of these settings may be used		
			RetainGrade checkbox	Withdraw checkbox	To be Graduated
Student is staying in the same school.	X – same school				
Student moving to another MyEd BC school.	X				
Student moving out of province, out of country, or to a non-MyEd BC school.				X	
Grade 12 student who is graduating.		X			X
Grade 12 student who is graduating but returning for additional courses next year.	X	X	X		
Grade 12 student who is graduating but has continuing course(s) and secondary association to a secondary school. Student status will be Active no Primary.		X			X
Grade 12 student who is NOT graduating and is returning to the same school next year.	X – same school		X		
Grade 12 student who is NOT graduating and is moving to a different school next year.	X		X		
Grade 12 student who is NOT graduating and is discontinuing schooling.				X	
Student withdrawing from their primary school, but continuing a secondary school association with another school. Student status will be Active no Primary.				X – Primary School	
Pre-Admit student for next school year	X – same school				

2.6 Student Secondary School Associations

Student secondary school associations without an end date or with a future end date (a date later than the EOYR process), will have a new secondary school association created at EOYR. Schools with secondary school associations for students should review these end dates and update them as appropriate.

End dated on or before Aug 8, 2017	Secondary school association is ended at EOYR
Future end dated - Post EOYR (Oct 26, 2017)	Secondary school association will be ended New secondary school association will be created with the end date from the previous year record
No end date	New secondary school association is created for the next school year. (2018)

Students withdrawn or graduated from their primary school with an open or next year secondary association will have the status of **Active no Primary** after EOYR. Students moving to a new primary school with open or next year secondary associations will have the status of **Active** after EOYR.

2.7 Pre-Registered Students

Give ALL Pre-Registered (PreReg) students a Next School value. This will ensure these students will show in the next year filter for school numbers. Pre-Admit students using PreReg as the enrollment type and the correct YOG. The current grade for pre-admit Kindergarten student will show EL, the EOYR process will advance them to KF as long as the correct YOG has been entered. It is recommended that Pre-Admit dates are current dates for membership record accuracy and adjustments pre EOYR, MyEducation handles the Pre-Admit identification through the status of PreReg and not the date. EOYR will update the PreReg student E membership record to the first day of the new school year.

If a student needs to make a last minute change of schools before EOYR, there is no need to withdraw the student and enroll them in the new school. Instead, assign a new Next School value and EOYR will transition them to the new school.

EOYR performs the following actions for students with a Pre-Reg status:

- Changes their enrollment status to Active.
- Changes their primary school value to the value in the 'Next school' field.
- Updates the most recent entry enrollment record with a date of August n, 20XX (eg. 09/08/2017).
- Updates the most recent entry enrollment record to Active.
- Updates the most recent entry enrollment record with the “Next School” set on the Pre-Transition field set.

2.8 Health Checks

Sorting and filtering the Pre transition field set by column can provide helpful information to schools and districts heading into EOYR. Check over the groups of students with each setting and use the Student Movement Scenarios grid to determine if the settings assigned to the student will have the desired result after EOYR.

EOYR Health Check filters are available at the District and School view on the Student top tab. These filters work with the Pre transition field set to identify students with potential data issues heading into EOYR, and students who will be changing from Active to Active no Primary.

2.8.1 Pre transition field set – sort by column and review:

- **Students set to 'RetainGrade', 'Withdraw' and 'to be graduated'** to ensure the lists are accurate.
- **Review the 'NextSkl>Name' field** to ensure the schools are listed are on the MyEd BC Active Schools List on the L1 Information Station.
 - Example: **Ooc – Other Schools** is not an active school. A student moving out of province or to a school not using MyEducation BC should have the next school field **blank** and the 'withdraw' flag checked. Use the Pre transition withdrawal code to identify movement.
- **Review the students with the Dip/SCCP date field populated** to ensure the correct students will have the date print on the PSR card.
- **Review the Pre transition withdrawal codes** to determine if they are the correct codes for the student.

School and District EOYR Filters:

2.8.2 EOYR – Future YOG flagged to graduate

The Graduate Seniors process will only look at students with a current YOG. (See Graduating Students section) Students in this list will *not* be a part of the Graduate Seniors process.

Review the student records in this list to determine which settings should be changed.

- If the student is not graduating, remove the 'to be graduated' flag
- Options if the student is graduating:
 - Change the YOG to the current year (Student > Options > Registration > Promote/Demote Student)
 - Or, withdraw the student prior to EOYR using the Graduate status and Graduated-Dogwood withdraw code

2.8.3 EOYR – Multiple flags set

Students may only have one movement flag set for EOYR.

Review the student records in this list to determine which settings should be changed.

- Review the Student Movement Scenarios section to determine which setting is appropriate for the student.

2.8.4 EOYR – Prior YOG still Active

This filter provides a list of students with a prior year YOG and an Active enrollment status. These records require a review for accuracy to ensure the pre transition settings are correct.

Students with a prior year YOG and the 'to be graduated' flag set will not be included in the Graduate Seniors process. (See Graduating Students section)

- If the student is continuing next year:
 - Review and change the YOG to the appropriate year for the student
 - Populate the next school if appropriate
- If the student is not continuing next year:
 - Flag the student to withdraw and enter the appropriate withdraw code
 - Or, withdraw the student prior to EOYR
- Options if the student is graduating:
 - Change the YOG to the current year (Student > Options > Registration > Promote/Demote Student)
 - Or, withdraw the student prior to EOYR using the Graduate status and Graduated-Dogwood withdraw code

2.8.5 EOYR – Students becoming Active no Primary

This filter provides a list of primary students with both the pre transition settings and Secondary Association settings that will result in a student status of Active no Primary next year.

Review the list of students and communicate as needed with the secondary school to determine if the student should be Active no Primary next year. If it is determined that Active no Primary will not be the correct status for the student, change the student settings as required.

- The student will be primary to the current Secondary School
 - Set the Secondary School as the Next School in the pre transition field set and remove the 'withdraw' or 'to be graduated' movement flag (Secondary school should also remove the next year association, or end date the current year secondary association). (Dip/SCCP date can be entered if appropriate)
- The student has completed work at the Secondary School and the school does not need access to the student record next year
 - The Secondary School can end date the secondary association prior to the end of the enterprise calendar year, or remove the next year secondary association as appropriate.

3.0 Other Tasks

3.1 General Programs

Students leaving for another school can have the school based general programs end dated.

3.1.1 To end date General Student Programs

1. Go to the **School** view.
2. In the **Student** top tab, select the **Membership** side tab
3. Click the **Programs** sub-side tab.
4. Click the Dictionary icon > Select **General Program**
5. Click **Options > Modify List**
6. Click the blue pencil icon in the **End** column
7. Enter the end appropriate end date for the general program
8. When complete, click the green checkbox to save the entries

Programs can be individually end dated by clicking into the details of the program instead of using Modify List.

Do not end date the current **Student Services 1701 Designation Program**. The designation record alerts the receiving school/district that a support plan may be needed.

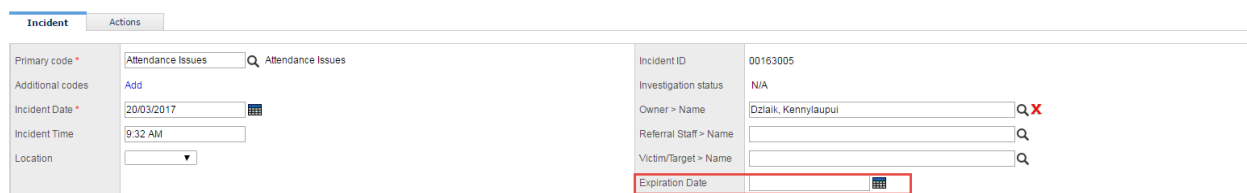
3.2 Student Conduct Incidents

Districts or schools that do not wish to have student conduct incidents travel to another school or the next school year, can choose to have these set to expire.

All Incidents with an expiry date that is on or before EOYR will be deleted when the Enterprise job is run to remove expired incidents.

3.2.1 To set expiration dates for individual student incidents

1. Go to the **School** view.
2. In the **Student** top tab, select the **Conduct** side tab
3. Click the **Incident** sub-side tab.
4. Click the blue hyperlink of the incident to expire.
5. Populate the **Expiration Date** field.
6. Click **Save**.





The screenshot shows the 'Incident' form with the following fields:

- Primary code: Attendance Issues
- Additional codes: Add
- Incident Date: 20/03/2017
- Incident Time: 9:32 AM
- Location: [Dropdown]
- Incident ID: 00163005
- Investigation status: N/A
- Owner > Name: Dzialik, Kennylaupui
- Referral Staff > Name: [Search]
- Victim/Target > Name: [Search]
- Expiration Date: [Red highlighted field]

3.2.2 To Set Expiration Dates for Multiple Student Incidents

Remember: Mass Update and Modify List functions can only be performed on Primary Active students. Set the filter to Primary Active Students if you intend to use these functions.

1. Go to the **School** view.
2. In the **Conduct** top tab, select the **Incident History** side tab.
3. Click the  icon and select the **Expiring Conduct Incidents** field set.
4. In the **Options** menu, select **Modify List**. Click the  icon to make the fields editable.
5. Populate the **ExpDate** field and **click the green check mark to save**.



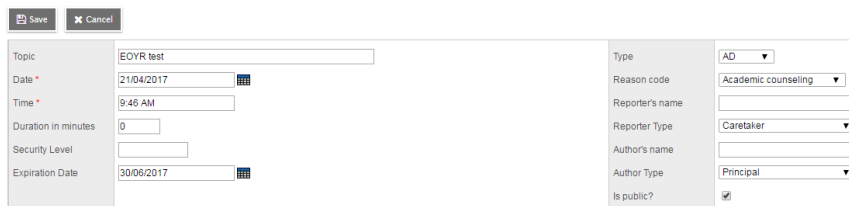
3.3 Student Journal Entries

Districts or schools that do not wish to have student Journal Entries travel to another school or the next school year, can choose to have these set to expire.

All Journal Entries with an expiry date that is on or before EOYR will be deleted when the Enterprise job is run to remove expired Journal Records.

3.3.1 To Edit Individual Student Journal Records



1. In the **School** view, select the **Student** top tab.
2. Select the student with journal entries to edit by checking the box beside their name.
3. Click the **Documents** side tab.
4. Click the **Journals** sub-side tab.
5. Click the blue hyperlink of the journal entry that requires editing.
6. Populate the **Expiration Date** field
7. Click **Save**



3.3.2 To Edit Multiple Student Journal Entries

Remember: Mass Update and Modify List functions can only be performed on Primary Active students. Set the filter to Primary Active Students if you intend to use these functions.

Note: Converted student journal entries that do not have the “Time” field populated will not allow the user to save the record until a time is entered in the record.

1. In the **School** view, select the **Global** top tab.
2. Click the **Student** side tab.
3. Select the **Student Journal** table by clicking the blue hyperlink. This will present a list of records if student journal entries have been recorded.
4. Click the  icon and select the **Default** field set.
5. In the **Options** menu, select **Modify List**. Click the  icon to make the fields editable.
6. Populate the **ExpDate** field and click the green check mark to save.



3.4 Check Former School & Secondary School Association End Dates

1. In the **School** view, select the **Global** top tab.
2. Click the **Favourites** side tab.
3. Select the **Student School Association** table by clicking the blue hyperlink. This will present a list of records of student school associations.
4. In the **Options** menu, select **Query**.
 - a. Leave the **Tables** field at **Student School Association**.
 - b. In the **Fields** area, select **Association type**.
 - c. In the **Operator** area, select **Equals**.
 - d. In the **Value** field, select **Former or Secondary as appropriate**. Click **Add**.
The selection should appear in the **Search Criteria** box.
 - e. Set **Search based on** to **All Records**. Click **Search**.
5. Review the records in the list and note records that **do not** have an **End Date**.
6. Populate the **End Date** to a date on or before the Calendar year end (Aug 8, xxxx) field to ensure the association is ended through EOYR.

3.5 Fees

Fee records with outstanding balances will be carried forward on the student record for all students. When the student remains in the same school, the school will be able to continue managing the fee from the previous year.

Students who are leaving the school through transition, transfer or withdrawal should have fee records with outstanding balances voided or deleted. The Fees Management reference guide contains instructions for voiding or deleting fees.

If a fee with an outstanding balance is carried forward to the new school, it will appear on the account statement for the student at the new school, who cannot manage the fee records from another school.

If an outstanding fee record is carried forward to a new school in error:

- The fee will appear on the account statement for the student at the new school.
- The fee will only be visible on the student record in the **Student** top tab > **Transactions** side tab > **Fees** sub-side tab. This will display the name of the school that assigned the fee so that school can be contacted to remove it.
- The fee will not be visible in the **School** top tab > **Cashier's Office** side tab at the new school. The new school cannot manage or delete the fee.
- The fee record will still be visible to the original school that assigned it in the **School** top tab > **Cashier's Office** side tab > **Fees** sub-side tab.

3.6 Lockers



Locker tables in the **School** view > **School** top tab > **Lockers** side tab do not have a school year context and will remain static from year to year unless manual changes are made. As these values may be assigned to student records in the current year, any deletions or modifications to the locker information should be done as a school start-up activity.



Locker values assigned to students will be retained from year to year. Schools using lockers in MyEducation BC may want to create a field set in the **Student** top tab that includes the locker field. The Modify list function could then be used to update the locker values on student records as a school start-up activity.

If students are transitioning out of your school, use list edit to remove the locker information from the student record before EOYR.

3.7 Transportation

Transportation fields are on the student table. Schools should review this information for students who are leaving their school and remove transportation information associated to these students. To update transportation information:

1. In the **School** view, click the **Student** top tab.
2. Use the  icon to select Primary Active students.
3. Use the  icon to select the **Bus Information** field set.
4. In the **Options** menu, select **Modify List**.

5. Click the  icon to open the necessary columns for editing. Make the necessary changes.
6. Be sure to click the  icon to save changes.

3.8 User Accounts

When creating User Accounts, the system will default to having them expire on the last day of the school year, this being Aug 8 of the current school year.

District support staff will want to ensure their own accounts do not expire and may want to review existing user accounts for the staff, students and contacts which will require access to MyEducation BC after EOYR.

3.8.1 To update the Account expiration date for an individual user:

1. Log in to the **District** view.
2. Click the **Admin** top tab and select the **Users** side tab.
3. Click the blue hyperlink of the username that requires the date change.
4. Update the **Account expiration date** field for the user.
5. Click **Save**.

3.8.2 To update the Account expiration date for multiple users:

1. Log in to the **District** view.
2. Click the **Admin** top tab and select the **Users** side tab.
3. Check the box beside the users that require the date change.
4. In the **Options** menu, select **Show Selected**. Be sure you have the correct users selected.
5. In the **Options** menu, select **Mass Update**. The mass update pop-up window will appear.
6. In the **Field** drop-down, select **Account expiration date**.
7. In the **Value** field, enter the new Account expiration date.
8. Click **Update**.

Note: Be sure you have the correct users selected. Date fields cannot be mass-updated to a blank value.

4.0 Student Services

Students who are enrolled in student services where the student is moving out of district, should be exited from student services prior to end of year rollover.

Schools should identify students who are withdrawing from their school or district and consult with their student services staff to ensure appropriate action is taken on these students.

Instructions for exiting students from student services are in the Student Services Processes and Workflows document.

Do not end date the current **Student Services 1701 Designation Program**. The designation record alerts the receiving school/district that a support plan may be needed.