

Summary

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 in the upcoming school year.

This article describes how to setup, validate, and initiate the PowerSchool End-of-Year Process.

Forward

[These instructions should only be followed once you have completed the tasks listed in the End-of-Year Preparation article.](#)

If you are using PowerScheduler, in most situations, it is preferable to commit your schedule before running the End of Year Process.

Note: The SIF adapter should not be used during the EOY process. Districts will need to change the setting at: Start Page > System Administrator> System Settings > Global API/SIF Settings.

Steps

1) Backup PowerSchool Data (Optional/Recommended)

Backup and archive your PowerSchool data file.

PowerSchool does not include the ability to undo the End-of-Year Process.

In the event that the End-of-Year Process is initiated on an incorrectly setup data file and the school year is improperly closed out, any erroneous changes made by this process may be undone by reverting to a data file backup.

2) End-of-Year Process - Preparation and Validation (Required)

Set the District Office as your current school.

Navigate to Start Page > System under Setup > End-of-Year Process.

3) Default Next School (Required)

Validate that each school is setup with a valid Default Next School for Students in the High Grade.

For example, a high school is typically setup with a default next school of 999999 (Graduated Students).

4) Years and Terms (Required)

Validate that the upcoming school year has been created under the Years and Terms in the Schools that will have students enrolled next year and the District.

5) Exit Codes (Required)

Select an Exit Code for each type of student: Graduating, Promoted to next school, Promoted within same school, Retained, and Demoted.

The End-of-Year Process will assign these Exit Codes to each student's current enrollment based on a comparison of each student's Next School Indicator, current school, Next Grade Level, and current grade level.

6) Entry Codes (Required)

Select an Entry Code for each type of student: Graduating, Promoted to next school, Promoted within same school, Retained, and Demoted.

The End-of-Year Process will assign these Entry Codes to each student's new/upcoming enrollment based on a comparison of each student's Next School Indicator, current school, Next Grade Level, and current grade level.

7) Exit Comments (Optional/Recommended)

Enter an Exit Comment for each type of student: Graduating, Promoted to next school, Promoted within same school, Retained, and Demoted. The End-of-Year Process will assign these Exit Comments to each student's current enrollment based on a comparison of each student's Next School Indicator, current school, Next Grade Level, and current grade level.

8) Fee Transfer Method (Required)

Select a fee transfer method.

If the "Roll over the current balance" option is selected, any student with a non-zero balance for the current school year will be given a SOY (Start of Year) Balance in their fee transactions for the upcoming school year.

If the "Zero the current balance" option is selected, students will start the upcoming school year with a zero balance for fee transactions.

Note: This option does not affect student lunch balances.

9) Validation (Required)

PowerSchool's End-of-Year Process includes a validation mode, during which the system will evaluate student, school, and district information for End-of-Year readiness.

PowerSchool's End-of-Year Process will not run unless all students and schools are properly configured for transfers into the upcoming school year.

To initiate the End-of-Year validation, use the dropdown to select one of the two validation options

Perform EOY Validation

Perform EOY Validation and make any students with the issue the current selection

10) Review and Correct Errors (Required)

As the End-of-Year validation process runs, various student or school-related errors may be displayed on the screen. Review and correct any errors that appear.

The validation process may be repeated multiple times to check your progress while correcting student setup or school setup data.

[Click here for a list of common EOY error messages and instructions on how to correct them.](#)

11) Backup PowerSchool Data (Optional/Recommended)

Once all validation errors have been corrected and the validation process no longer returns any errors, perform a Datapump Export and store it securely.

Label this backup appropriately to indicate that all End-of-Year validation errors have been corrected.

At this time, it is likely that no more changes are necessary before running the End-of-Year Process.

12) Verify Settings (Optional/Recommended)

Verify that the Exit Codes, Entry Codes, Exit Comments, and Fee Transfer Method are still set as they were before running the validation process.

13) Start the End-of-Year Process (Required)

Set the District Office as your current school and navigate back to Start Page > System Administrator > End-of-Year Process.

From the drop down select Perform EOY and Promote Students

"Click the "Perform End-of-Year Processing" button to initiate the End-of-Year Process. Be sure that the server is able to run uninterrupted (without being shut down) while this process runs through to completion (up to 4 hours).

Note: If any schools or students are improperly setup for the End-of-Year Process, PowerSchool will halt the process and return errors. These errors must be corrected before the End-of-Year Process can run.

14) End-of-Year Process Complete

As the End-of-Year Process runs, PowerSchool will display its progress on the screen.

The following message will be displayed in your browser once the End-of-Year Process is complete.

End-of-Year Process Complete

15) Backup PowerSchool Data (Optional/Recommended)

Once the End-of-Year Process is complete, create and archive another Datapump export. Label this backup appropriately to indicate that the End-of-Year Process has been completed.

[Once you have completed the End-of-Year Process, click here to see a list of post End-of-Year \(EOY\) activities that may need to be performed on your PowerSchool server.](#)

Start Page > Reports > Run Reports > Enrollment By Grade > Possible Conflicts

Identified 3323 students with possible Enrollment date errors