

End of Year Processing – Progression

****Please Note the Following****

1. Administration must typically complete all current school year activities *before* progressing students, since these items are tied to students' current grade levels
2. If you Cleared the Next Year Grade Level for students attending **Summer School**, please Update Now
****See Step 3 for Instructions****
3. Please verify All Student Report Cards have been Archived

Step 1: Prepare for Progression

1. Enter Graduation Date for all Current Year Graduates

From main menu please select **Configuration**



Select Grade Levels



Select **8th Grade**. Place Checkmark in Graduating Checkbox. Enter **Graduation Date** (This can be updated as needed). Select Apply to Students

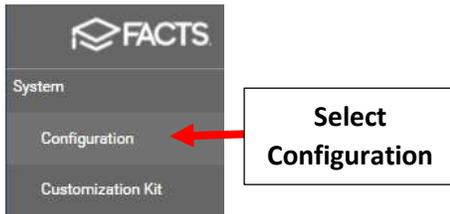
A screenshot of the Graduation configuration screen. On the left is a list of grade levels from PK3 to 08. On the right is a form with the following fields: 'Attendance Method' (dropdown), 'Create Day Attendance' (button), '*Must save grade level before performing this action.' (text), 'Graduation Plan' (dropdown), 'Graduating?' (checkbox with a checkmark), 'Date' (text field with 'Tuesday, Jun 27, 2023'), and 'Apply to students' (button). Annotations include: '1. Select 8th Grade' pointing to grade 08; '2. Check Graduating Checkbox' pointing to the 'Graduating?' checkbox; '3. Enter Graduation Date' pointing to the 'Date' field; and '4. Select Apply to Students' pointing to the 'Apply to students' button.

You will Receive **Confirmation** when Completed

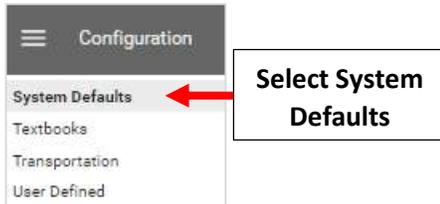


2. Check for Missed Attendance. Check for Missed Attendance. Review your **Day Attendance Summary Reports** run previously for End of Year and verify **Attendance** has been taken for **EACH** child for Each School Day.
3. ***Optional*** Run any reports needed for currently enrolled students. This would include any Attendance Reports, Class Lists, etc.
4. Restrict Gradebook and Report Card editing for the current year to prevent teachers from modifying grades. ****DO NOT Lock Gradebook Until ALL GRADES Have Been Finalized****

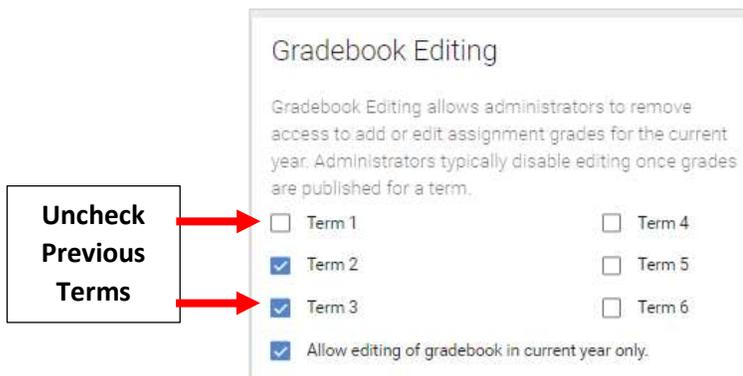
From main menu please select **Configuration**



Select **System Defaults**

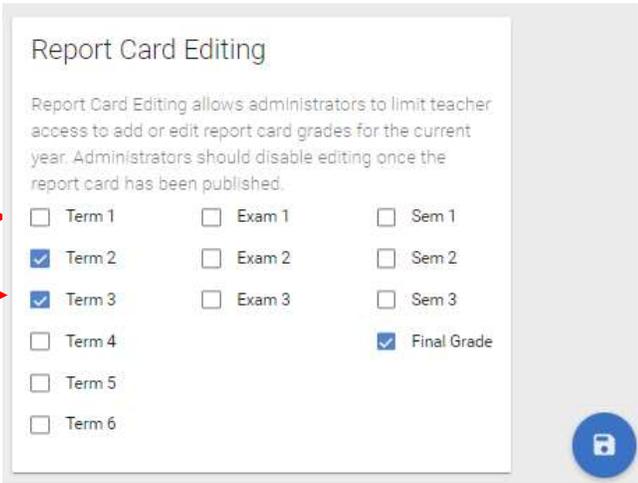


Gradebook Editing – **Uncheck Previous Term** to prevent Edits to Gradebook



*****Please Note: DO NOT Lock**
Gradebook Until ALL GRADES
Have Been Finalized***

Report Card Editing - **Uncheck Previous Term** to prevent Edits to Report Card Grades. Select **Save** to **Save** your Changes



The screenshot shows the 'Report Card Editing' interface. A text box on the left says 'Uncheck Previous Terms' with red arrows pointing to the checkboxes for Term 2 and Term 3. A text box on the right says '**Please Note: DO NOT Lock Report Cards Until ALL GRADES Have Been Finalized' with a red arrow pointing to the 'Final Grade' checkbox. A text box at the bottom right says 'Select **Save** to **Save** your Changes' with a red arrow pointing to the save button.

Term	Exam	Sem
<input type="checkbox"/> Term 1	<input type="checkbox"/> Exam 1	<input type="checkbox"/> Sem 1
<input checked="" type="checkbox"/> Term 2	<input type="checkbox"/> Exam 2	<input type="checkbox"/> Sem 2
<input checked="" type="checkbox"/> Term 3	<input type="checkbox"/> Exam 3	<input type="checkbox"/> Sem 3
<input type="checkbox"/> Term 4		<input checked="" type="checkbox"/> Final Grade
<input type="checkbox"/> Term 5		
<input type="checkbox"/> Term 6		

Step 2. Check Configuration Settings

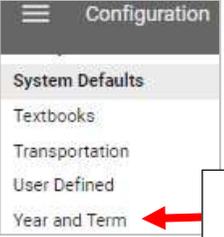
1. Review your list of School Years to confirm a new school year has been created for next year

From main menu please select **Configuration**



The screenshot shows the FACTS System menu. The 'Configuration' option is highlighted, and a red arrow points to it from a text box that says 'Select Configuration'.

Select **Year and Term**.



The screenshot shows the Configuration menu. The 'Year and Term' option is highlighted, and a red arrow points to it from a text box that says 'Select Year and Term'.

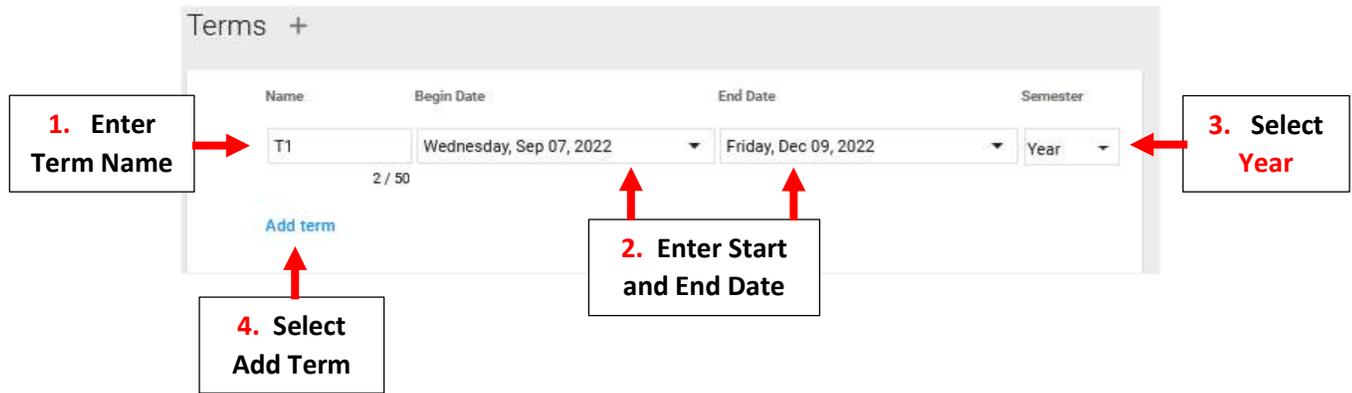
Existing School Years Display. Verify **New School Year** has been created



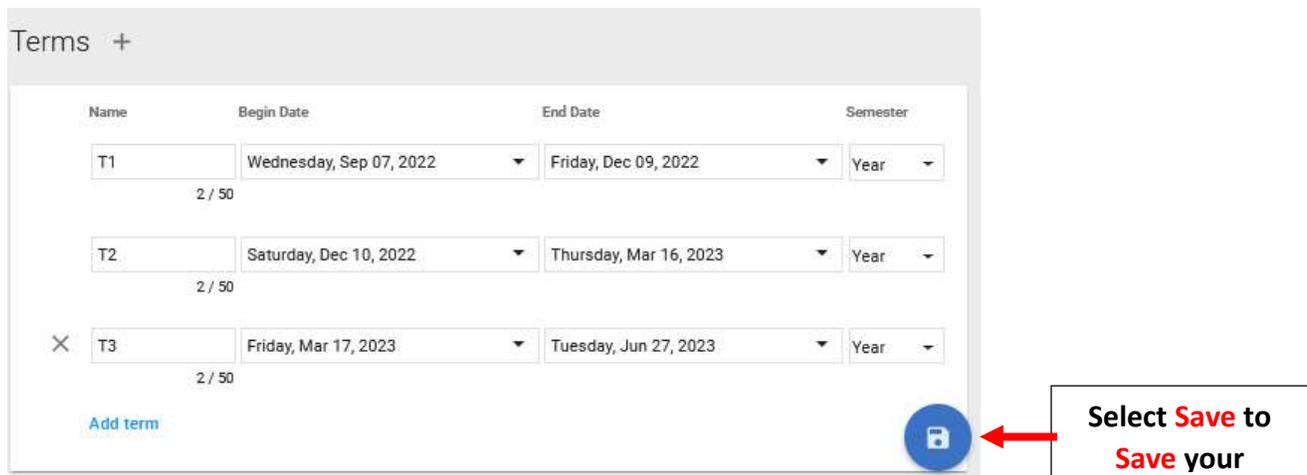
The screenshot shows a list of School Years. The year '2022-2023' is highlighted, and a red arrow points to it from a text box that says 'Verify New School Year is Created'.

School Years
2022-2023
2021-2022
2020-2021
2019-2020
2018-2019

Add your School Term. Enter **Term Name** and **Start and End Date** of Term. Select **Year** in the Semester Dropdown then **Add Term** to additional Terms



Once all Terms have been Entered Select **Save** to **Save** your Changes



2. Confirm Next Grade Levels are configured correctly

From main menu please select **Configuration**



Select **Grade Levels**

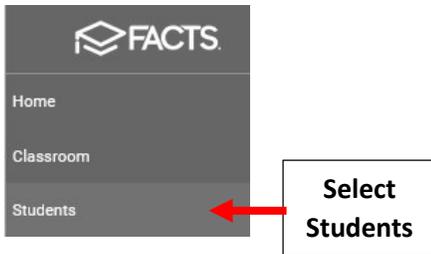


Step 3. Update Student Information

****Please Note: Updates are Done One Student at a Time. There is NO Bulk Update Option**

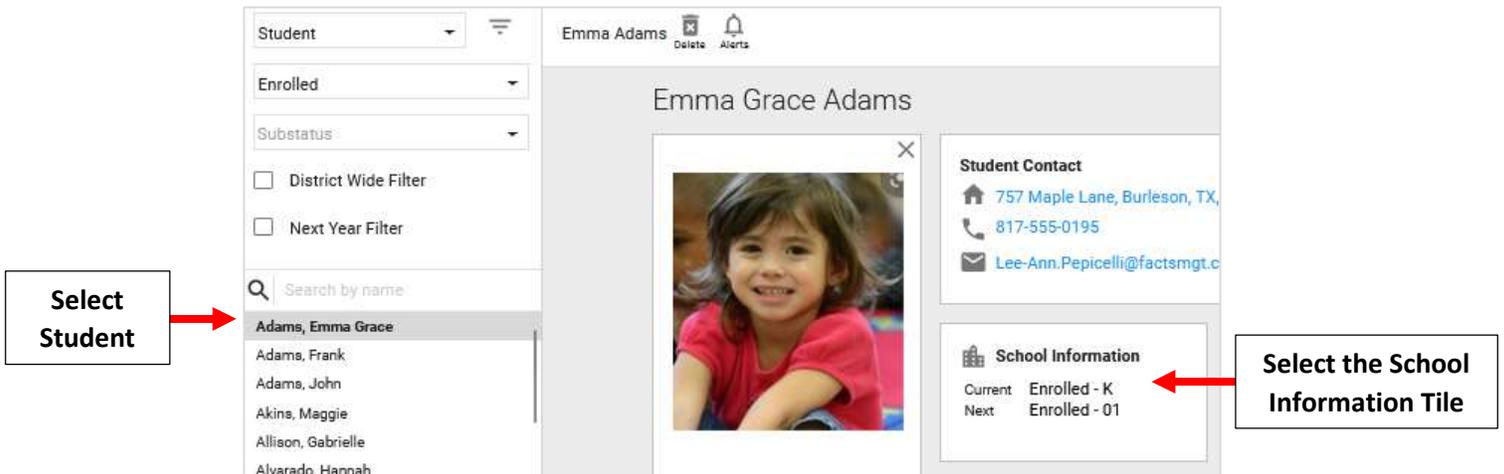
1. Change Next Grade Level for Students being **Retained** in their Current Grade

Select **Students** from main menu

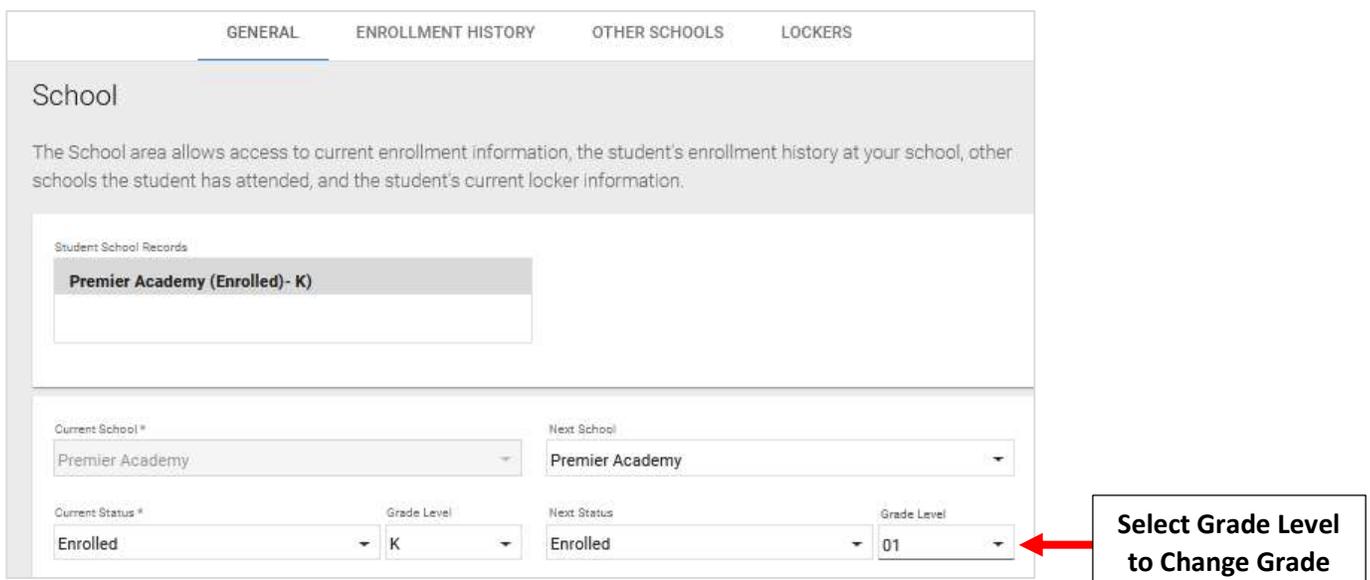


****Applies Only to Students being ** Retained in Same Grade Level**

Select **Student** From List than Select the **School Information** Tile

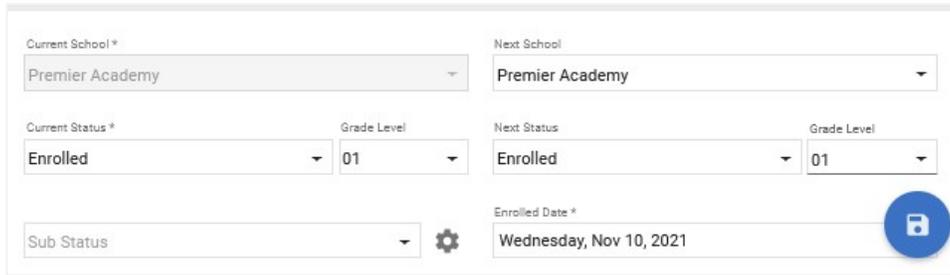


Select the **Grade Level** Drop Down and Change Grade



Select **Save** to **Save** your Changes

****Please Note: Updates are Done One Student at a Time. There is NO Bulk Update Option**



The screenshot shows a form for editing a student record. It includes fields for 'Current School *' (Premier Academy), 'Next School' (Premier Academy), 'Current Status *' (Enrolled), 'Grade Level' (01), 'Next Status' (Enrolled), 'Grade Level' (01), 'Sub Status', and 'Enrolled Date *' (Wednesday, Nov 10, 2021). A blue circular save button with a floppy disk icon is located at the bottom right of the form.

Select **Save** to **Save** your Changes

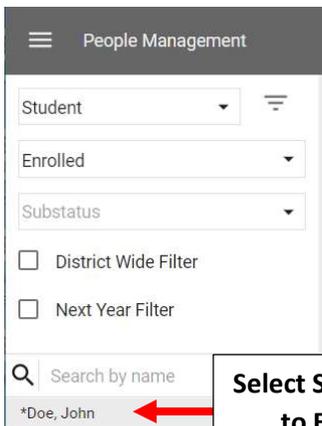
2. Withdraw Students Not Returning

Select **Students** from main menu



Select Students

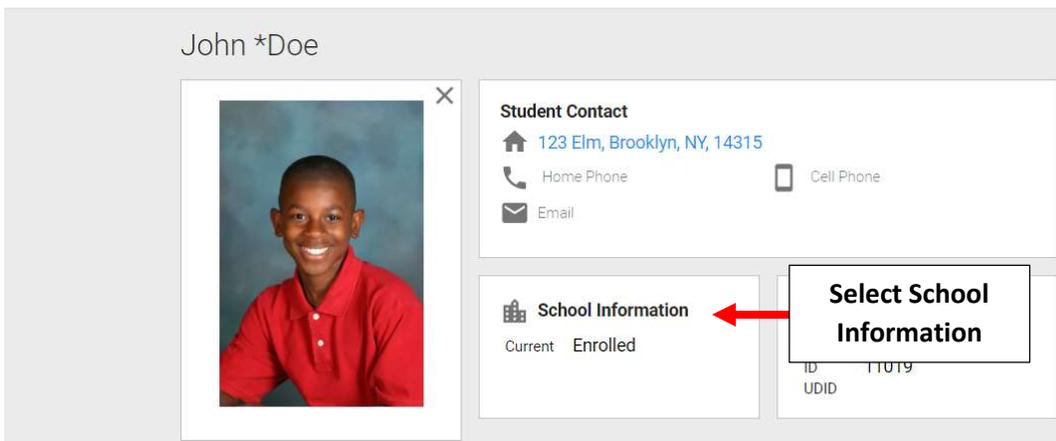
Select the Student you would like to Edit



Select Student to Edit

Select the **School Information** Tile

John *Doe  



Select School Information

Select **“Withdrawn”** from the **“Current Status”** dropdown

A screenshot of a web form. The 'Current Status' dropdown menu is open and shows 'Withdrawn' selected. A red arrow points from a box labeled 'Select Withdrawn' to the 'Withdrawn' option. Other fields include 'Current School' (Premier Academy), 'Next School', 'Sub Status', 'Enrolled Date' (Tuesday, Oct 22, 2019), and 'Grade Level'.

You will be asked to **Confirm** your Status Change. Select **“Yes”**

A confirmation dialog box titled 'Confirm Status Change'. It contains the text: 'Are you sure you want to withdraw/inactivate this student from the school? This will remove the student from any enrolled classes. Changing a student status to Withdrawn does not affect existing tuition or billing balances. Please notify the person at your school responsible for tuition and fees to prevent future billing to the family.' At the bottom right, there are 'No' and 'Yes' buttons. A red arrow points from a box labeled 'Select “Yes”' to the 'Yes' button.

Select **Withdraw Date** dropdown to choose **Withdraw Date**. Select **Withdrawn Reason** from the **“Withdraw Reason”** dropdown. Select **Save** to **Save** your Changes

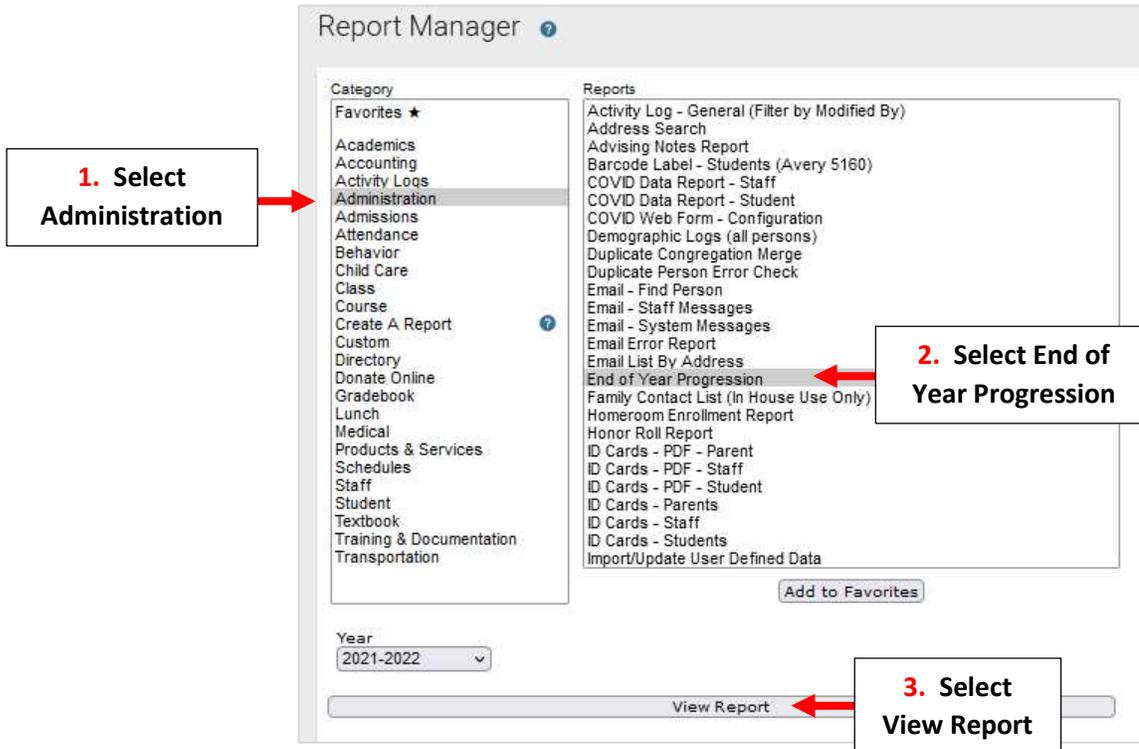
A screenshot of the full form with several fields filled out. A box labeled '1. Select Withdraw Date' has a red arrow pointing to the 'Withdraw Date' dropdown, which is set to 'Thursday, Jun 16, 2022'. Another box labeled '2. Select Withdraw Reason' has a red arrow pointing to the 'Withdraw Reason' dropdown, which is set to 'Moved'. A third box labeled '3. Select Save to Save your Changes' has a red arrow pointing to a blue circular 'Save' button at the bottom right. Other fields include 'Current School' (Premier Academy), 'Next School', 'Current Status' (Withdrawn), 'Grade Level', 'Sub Status', 'Enrolled Date' (Wednesday, Nov 10, 2021), 'Graduation Date', 'Placement', 'Student ID' (1202690), 'School UD ID', 'Reenrollment Status' (Open), and 'School Year' (2022-2023).

Step 4. Run End of Year Progression

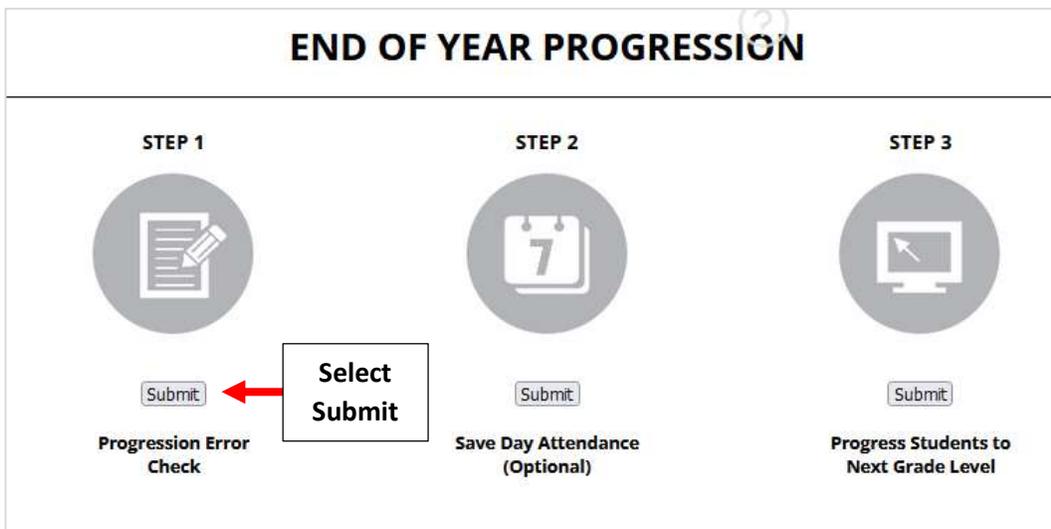
1. Progression Error Check. From the main menu Select **Report Manager**



Select **Administration > End of Year Progression** and Select **View Report**



Select **“Submit”** for Step 1: Progression Error Check



The **Progression Error Check Report** will display. Verify that **Next Grade, Next Status, and Next School** are correct for all students. Any Error Message will display in **Red**.

****Please Make ANY Corrections Before Continuing****

Progression Error Check ?

Premier Academy (2022-2023)

Printed: 17-Jun-22

Next Year School and School Year Check

Below is a list of school(s) in your district where your current students will be progressed to. Make sure the Next Year field is appropriately set for each school. This is set in Admissions > Enrollment Year drop down.

School Name	Next Year
Premier Academy	2022-2023

Student Next Year Status Check: (2022-2023)

(If receiving a warning about archived report cards, please confirm the Default Year in System > Configuration > System Defaults is the current (progress from year and the students have an archived report card for this year, then run the Progression Error Check again.)

Below is a list of students and their currently assigned next year schools, statuses and grade levels. Progression should not be run until all errors are removed and you have visually verified for appropriate settings.

Student	Student ID	Grade	Next Grade	Status	Next Status	School	Next School	Last Progression Must be 9 months	Error Message
Bradley, Megan	1202678	PK3	PK3	Pre-Enrolled	Enrolled	MAIN	MAIN		
Brasher, Elliott	1202599	PK3	PK3	Pre-Enrolled	Enrolled	MAIN	MAIN		
Collins, Josh	1202594	PK3	PK3	Pre-Enrolled	Enrolled	MAIN	MAIN		
Connolly, Ben	1202444	PK3	PK3	Pre-Enrolled	Enrolled	MAIN	MAIN		
Eckert, Elena	1202721	PK3	PK3	Pre-Enrolled	Enrolled	MAIN	MAIN		
Kane, Henry	1201749	PK3	PK3	Pre-Enrolled	Enrolled	MAIN	MAIN		
Leonard, Susan	1202740	PK3	PK3	Pre-Enrolled	Enrolled	MAIN	MAIN		
Browning, Caleb	1201718	PK3	PK4	Enrolled	Enrolled	MAIN	MAIN		Warning: No report card archive found for 2021-2022.
Burnett, Finley	1201720	PK3	PK4	Enrolled	Enrolled	MAIN	MAIN		Warning: No report card archive found for 2021-2022.
Burrell, Jayden	1201721	PK3	PK4	Enrolled	Enrolled	MAIN	MAIN		Warning: No report card archive found for 2021-2022.
Connolly, Abby	1202442	PK3	PK4	Enrolled	Enrolled	MAIN	MAIN		Warning: No report card archive found for 2021-2022.
Connolly, Carly	1202445	PK3	PK4	Enrolled	Enrolled	MAIN	MAIN		Warning: No report card archive found for 2021-2022.
Crawford, Daniel	1201726	PK3	PK4	Enrolled	Enrolled	MAIN	MAIN		Warning: No report card archive found for 2021-2022.
Dai, Yi	1202576	PK3	PK4	Enrolled	Enrolled	MAIN	MAIN		Warning: No report card archive found for 2021-2022.
Gamble, Anastasia	1201734	PK3	PK4	Enrolled	Enrolled	MAIN	MAIN		Warning: No report card archive found for 2021-2022.
Gutierrez, Kaden	1201829	PK3	PK4	Enrolled	Enrolled	MAIN	MAIN		Warning: No report card archive found for 2021-2022.
Kaiser, London	1201616	PK3	PK4	Enrolled	Enrolled	MAIN	MAIN		Warning: No report card archive found for 2021-2022.
Koch, Melissa	1202417	PK3	PK4	Enrolled	Enrolled	MAIN	MAIN		Warning: No report card archive found for 2021-2022.
Malone, Timothy	1202420	PK3	PK4	Enrolled	Enrolled	MAIN	MAIN		Warning: No report card archive found for 2021-2022.
Nadeau, Aria	1201853	PK3	PK4	Enrolled	Enrolled	MAIN	MAIN		Warning: No report card archive found for 2021-2022.
Ocomor, Callie	1201857	PK3	PK4	Enrolled	Enrolled	MAIN	MAIN		Warning: No report card archive found for 2021-2022.
Robinson, Hunter	1201783	PK3	PK4	Enrolled	Enrolled	MAIN	MAIN		Warning: No report card archive found for 2021-2022.
Smith, John	1202395	PK3	PK4	Enrolled	Enrolled	MAIN	MAIN		Warning: No report card archive found for 2021-2022.
Villa, Nora	1201882	PK3	PK4	Enrolled	Enrolled	MAIN	MAIN		Warning: No report card archive found for 2021-2022.
Wang, Sara	1201799	PK3	PK4	Enrolled	Enrolled	MAIN	MAIN		Warning: No report card archive found for 2021-2022.
Zamora, Kelsi	1202591	PK3	PK4	Enrolled	Enrolled	MAIN	MAIN		Warning: No report card archive found for 2021-2022.

****Please Make ANY Corrections Before Continuing**

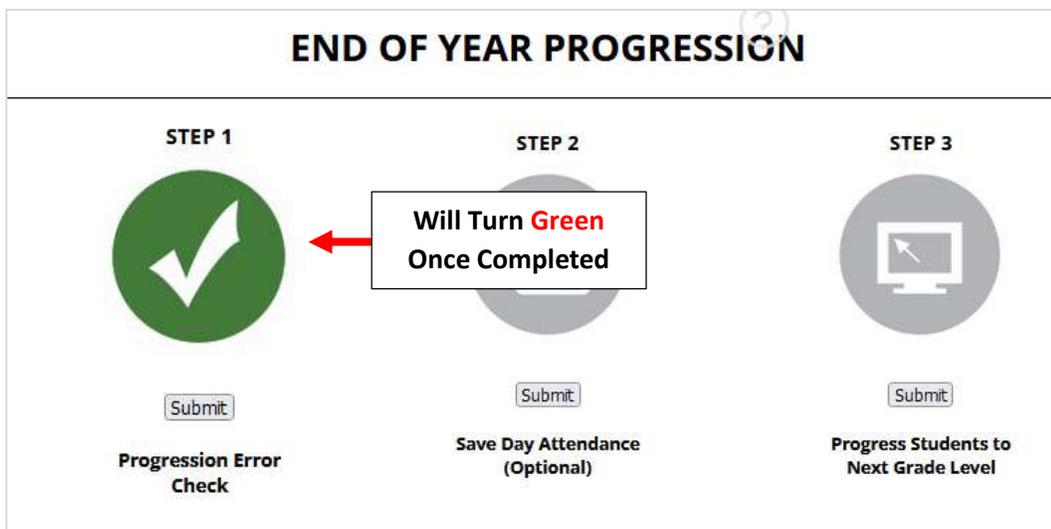
Errors Will Display in Red

Progression Error checks and Warnings:

The table below explains the errors and warnings you may see on the Progression Error Check report. Some errors may be fixed using [Next Grade / Next School Clean Up](#).

Error or Warning	Explanation	How do I fix it?
Error: Missing next school	Student has no Next School selected; may be ignored if the student will be Withdrawn next year.	Correct the student's Next School .
Error: Missing next status	Student has no Next Status .	Correct the student's Next Status or change to Withdrawn if the student is not returning.
Error: Missing next grade	Student's Next Status is Enrolled , but no next Grade Level is selected.	Confirm student's Next School is correct, then select the student's next Grade Level . May be left blank if it is currently unknown (common for PK and K) or if student is not returning.
Error: No next grade expected	Displays when student's Next Status is Withdrawn but student has a next Grade Level selected. May be ignored if the student is not returning.	Clear the student's next Grade Level to remove the error.
Warning: Next grade level not the default setting	Displays when the grade level is not expected, for example a 7 th grader progressing to 7 th grade rather than 8 th grade.	Correct the student's next Grade Level unless the student is being retained in the same grade.
Warning: No report card archive found	This warning is expected for new students, but may indicate a problem if the student has been attending classes for some time.	Archive report cards for all returning students. May be completed after progression, if necessary, since report cards archived within 21 days of progression will display students' pre-progression grade level.
Warning: Wrong next school	Displays when the Next School is not what is expected. For example, the Next School is your Middle School for a current Upper / High School student. May be ignored if the student will be Withdrawn next year.	Correct the student's Next School if the student is returning next year.

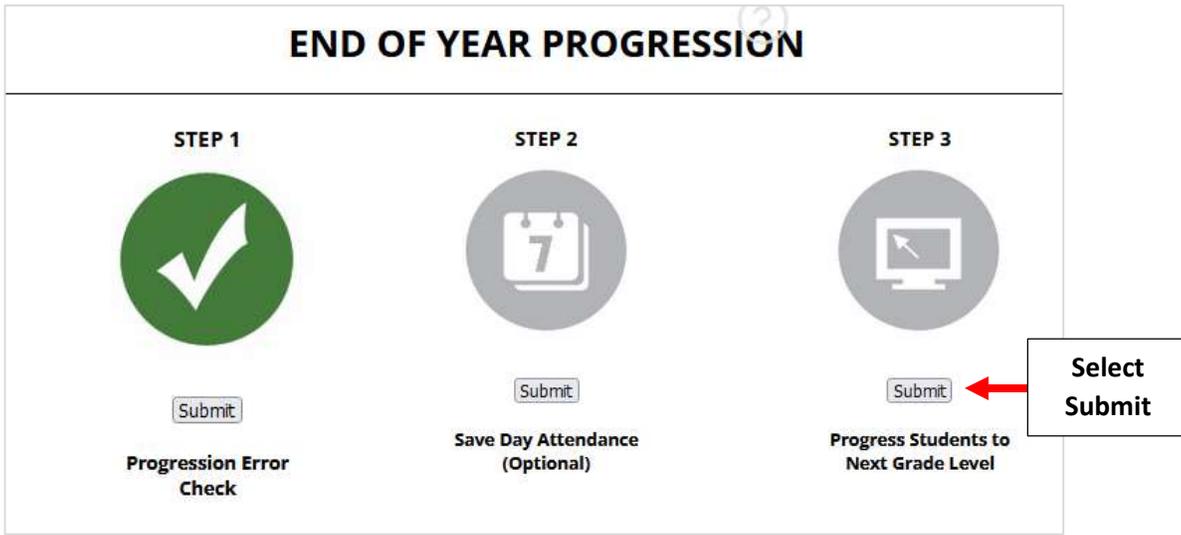
Once Completed Checkmark will Turn Green



2. Step 2: Save Day Attendance (Used Only for Schools with Transcripts)

****Brooklyn Schools Do Not Complete****

3. Select "Submit" for Step 3: Progress Students to Next Grade Level



The Following Message will Display. Once Confirmed **Next Year's Data** has been **Entered Correctly** Select "OK" to Continue. ****Please Note this CANNOT Be Undone****

This function will take the enrolled and pre-enrolled students and progress them to next year's grade level and status as shown in the student screen.

YOU SHOULD NOT RUN THIS JOB UNTIL YOU ARE SURE THAT NEXT YEAR'S DATA IS CORRECTLY ENTERED!

YOU CAN ONLY RUN THIS JOB ONCE PER YEAR!

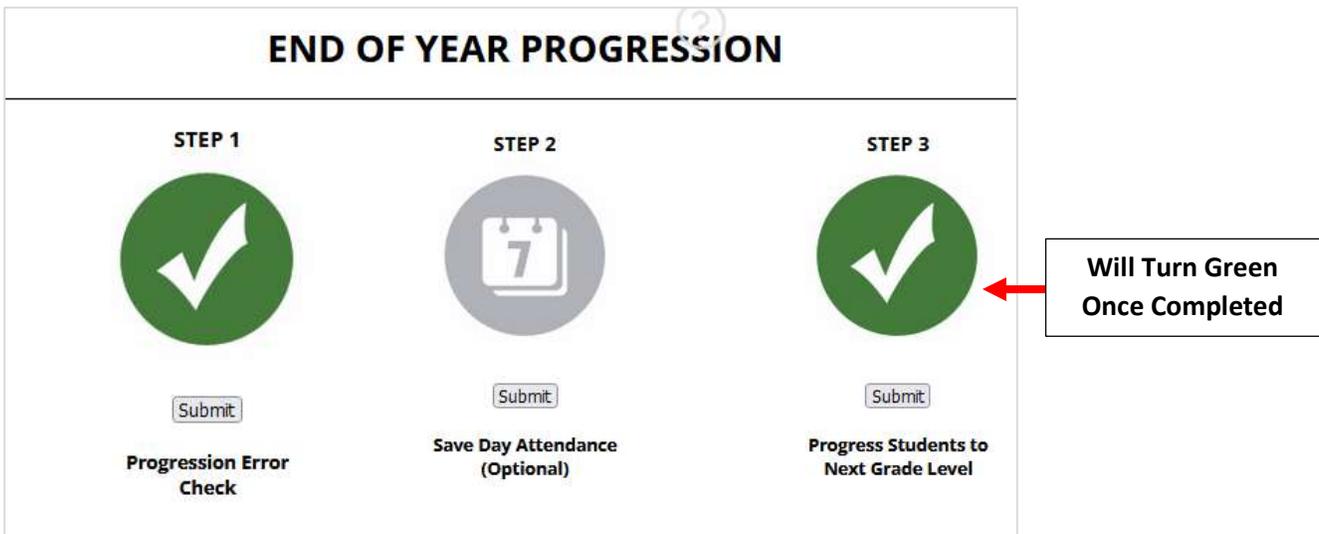
ARE YOU SURE YOU WISH TO PROCEED?

OK

Select OK

****Please Note this****
CANNOT Be Undone

Once Completed Checkmark will Turn Green



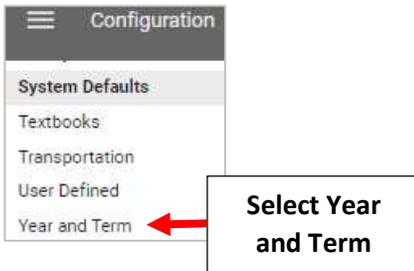
Step 5. Update/Configure Areas for Next Year

1. Update Default Year and Term - If Changes are Needed.

From main menu please select **Configuration**



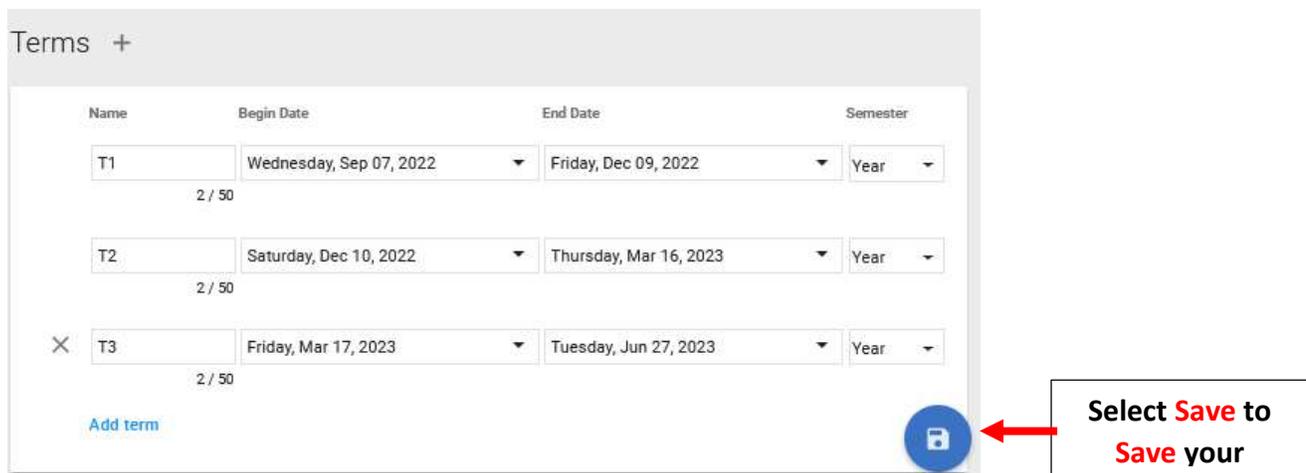
Select **Year and Term**.



Select School Year to Edit



Once Changes are made Select **Save to Save** your Changes

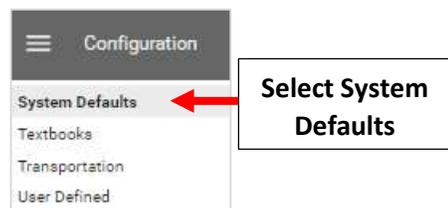


2. Update Family Portal Configuration for Default School Year

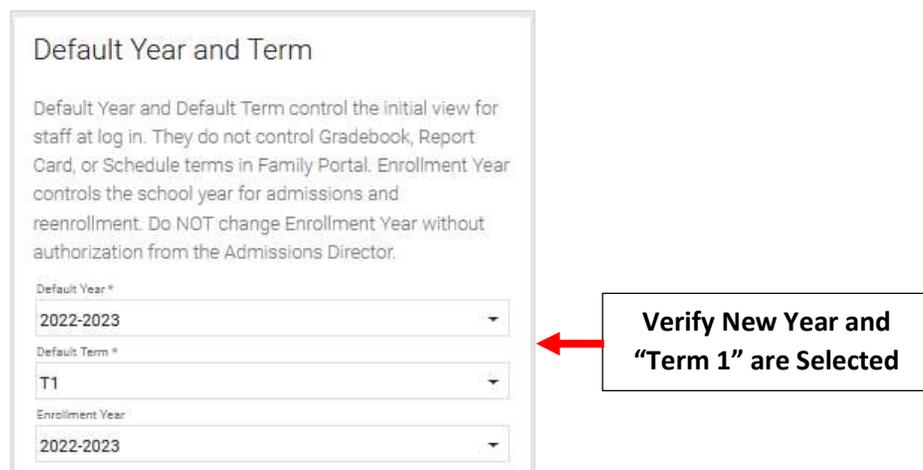
From main menu please select **Configuration**



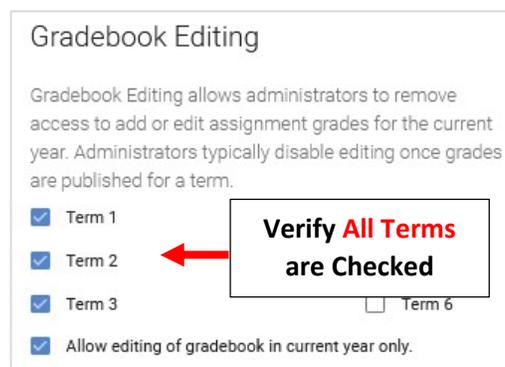
Select **System Defaults**



Verify **New Year** and **“Term 1”** are Selected. ****Do Not Change Enrollment Year Without Authorization from Admissions Director****



Gradebook Editing – Verify **All Terms** are **Checked**



Report Card Editing - Verify All Terms are Checked. Select Save to Save your Changes

Report Card Editing

Report Card Editing allows administrators to limit teacher access to add or edit report card grades for the current year. Administrators should disable editing once the report card has been published.

<input checked="" type="checkbox"/> Term 1	<input type="checkbox"/> Exam 1	<input type="checkbox"/> Sem 1
<input checked="" type="checkbox"/> Term 2	<input type="checkbox"/> Exam 2	<input type="checkbox"/> Sem 2
<input checked="" type="checkbox"/> Term 3	<input type="checkbox"/> Exam 3	<input type="checkbox"/> Sem 3
<input type="checkbox"/> Term 4		<input checked="" type="checkbox"/> Final Grade
<input type="checkbox"/> Term 5		
<input type="checkbox"/> Term 6		

 **Verify All Terms are Checked**

3. Update Scheduling Status/Grade Level

Select **Scheduling** from the main menu



Report Manager

Scheduling

Security

System

Select Scheduling

Verify **New School Year** is displaying in dropdown and **Toggle "Use Next Year Status / Grade Level"** is turned to turn **"Off"**.

Verify Toggle "Use Next Year Status / Grade Level" is turned "Off"

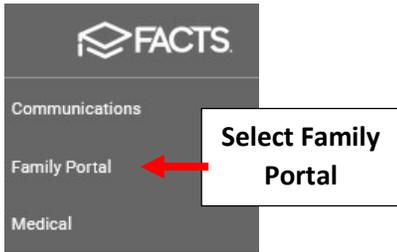
Scheduling

2022-2023

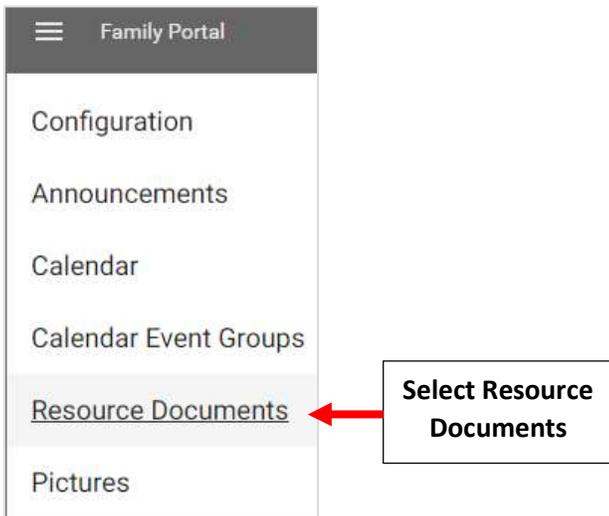
Use Next Status / Grade Level

Preschool

4. Update Family Portal Resource Documents to Remove Old Information and Add New



Select Resource Documents

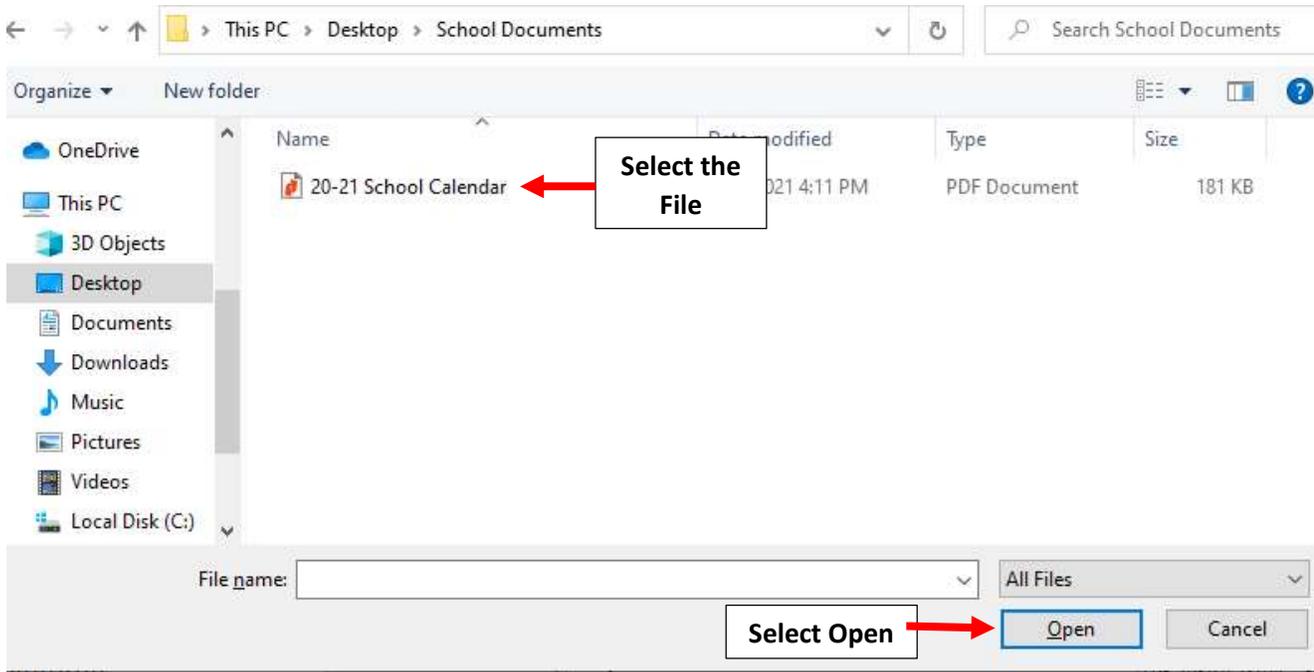


Select Choose File to Select file to upload ****Please Note: These are Sample Files and May Not Apply to Your School****

Filename	Caption	ID	Resource Documents		View document	File to upload (Required)
			District Wide	Newsletter		
<input type="radio"/> COVID.pdf	COVID-19 Guidelines & Screening	93	Yes	No	View document	<input type="button" value="Choose File"/>
<input type="radio"/> 2020.pdf	2020-2021 Student Handbook	92	Yes	No	View document	<input type="text" value="Caption"/> <input type="checkbox"/> District Wide <input type="checkbox"/> Newsletter
<input type="radio"/> Coat Drive.docx	Winter Coat Drive for Needy Families	83	Yes	No	View document	<input type="button" value="Upload"/> The upload process can take several minutes for large files - please click 'Upload' only once.

A callout box with the text 'Select Choose File' has a red arrow pointing to the 'Choose File' button in the first row of the table.

Select the file and click Open. The file displays in the File to upload field



Type a Caption and Select the Newsletter option to display the document in the Newsletter area of Resource Documents. Select "Upload" to add the file to the Resource Documents list in Family Portal



Congratulations! Progression has been Completed!