



School District 8  
Kootenay Lake

## Year-End Preparation - Elementary

Date: May 1, 2019

## Contents


Year-End Preparation Checklist .....	2
1.0 Review staff lists and secondary school associations.....	4
2.0 Student Transition Data Review .....	4
3.0 End-Date General Student Program Assignments .....	6
Feeder Students.....	6
Withdrawing Students.....	7
4.0 Delete Emergency Contacts for Student Leaving District.....	8
5.0 Run Reports for Students Leaving .....	8
6.0 Run Required School Data Backup .....	9
7.0 Confirm Master Schedule in Build View .....	10

## Year-End Preparation Checklist

✓	Task	Navigation	Comments
	Review staff lists and secondary school associations.	<b>School</b> view > <b>Staff</b> top tab <ul style="list-style-type: none"> <li>Set filter to <b>All Active Staff</b>.</li> </ul>	<ul style="list-style-type: none"> <li>Do not add or delete staff records!</li> <li>Provide district support staff with a list of staff that are not associated to this school for the next school year or those which need to be added.</li> <li>Use <b>Options &gt; Rollover Staff Schools</b> to retain staff that have a different primary school.</li> </ul>
	Student transition data review	<b>School</b> view > <b>Student</b> top tab > Set <i>field set</i> to <b>SD8: Elementary Pre-Transition</b>  Tips: <ul style="list-style-type: none"> <li>Use the <b>Grade Level = ?</b> filter to isolate feeder students and review the data.</li> <li>Use the <b>SD8: Grade Level does NOT = ?</b> filter with <b>Search based on</b> set to <b>Primary Active Students</b> to retrieve all students who are not in the feeder grade for easy review.</li> <li>Use the <b>Pre-Reg Students</b> filter to review settings for next year</li> <li>Click the column headers to sort information. This helps to look for blank or incorrect values.</li> <li>Use the <b>Next Year Students</b> filter to get a list of all students attending next year.</li> </ul>	<ul style="list-style-type: none"> <li>Set filter to <b>Primary Active Students</b> <ul style="list-style-type: none"> <li><b>Next Skl &gt; Name:</b> Ensure all students have a value. The only time this is blank, is if the student is leaving the school and their next school is unknown.</li> <li><b>RetainGrade:</b> This field should be set to <b>N</b> for all students who will be advancing to the next grade.</li> <li><b>Withdraw:</b> This field should be set to <b>N</b> for all students. The only time this is set to <b>Y</b>, is if the student is leaving the school and their destination is unknown.</li> <li><b>Pre-transition Withdrawal Code:</b> Set as appropriate for students leaving the school. (Use <b>To Next School</b> for feeder students).</li> <li><b>NextHomeroom:</b> If known, students can be assigned a next homeroom value.</li> </ul> </li> <li>Set filter to <b>Pre-Reg Students</b> <ul style="list-style-type: none"> <li>Review next year settings for Pre-Reg students as for primary active students.</li> </ul> </li> <li>Set filter to <b>Next Year Students</b> <ul style="list-style-type: none"> <li>Students with a next school value of this school will show here, including Pre-Reg students.</li> <li>Click <b>School &gt; Name</b> header to sort by school. Review pre-transition settings for students coming from other schools. If corrections are required, contact the current school.</li> </ul> </li> </ul>

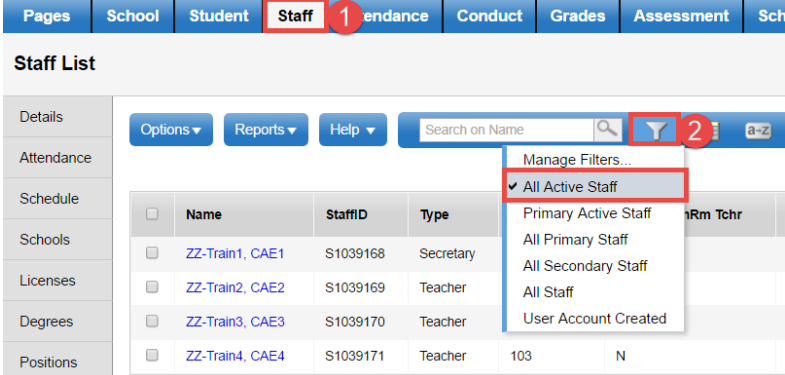
✓	Task	Navigation	Comments
	<p>End-date <b>general</b> student program assignments for students leaving the school</p> <p><b>Do not end date student services designations unless instructed!</b></p>	<p><b>School</b> view &gt; <b>Global</b> top tab &gt; <b>Favorite</b> side tab &gt; <b>Student Program Participation</b> table.</p> <ul style="list-style-type: none"> <li>Set field set to <b>SD8 Programs Field Set</b></li> </ul>	<ul style="list-style-type: none"> <li>Set filter to <b>End Date Empty for Grade = ?</b> <ul style="list-style-type: none"> <li>Enter the feeder grade <i>leaving</i> this school.</li> <li>Click the <b>Program</b> header to filter student services designations to the top. Use <b>Options &gt; Omit Selected</b> to remove these from the list.</li> <li>Populate end-dates for general programs (do not end-date student services designations)</li> </ul> </li> <li>Set filter to <b>SD8: Active Students</b> <ul style="list-style-type: none"> <li>Click the <b>Withdraw</b> header twice so records for any students flagged to withdraw at EOYR are sorted to the top.</li> <li>Populate end dates for general programs. Ask if student services designations should be end-dated as well.</li> </ul> </li> </ul>
	<p>Delete emergency contacts for students leaving the district</p>	<p><b>Student</b> top tab &gt; set field set to SD8 Elementary Pre-Transition</p>	<ul style="list-style-type: none"> <li>Check the box beside students leaving the district. Use <b>Options &gt; Show Selected</b> to isolate these students.</li> <li>In the <b>Contacts</b> side tab, check the box beside emergency contacts and click <b>Options &gt; Delete</b> to remove the.</li> </ul>
	<p>Run reports for students leaving the school</p>	<p><b>School</b> view &gt; <b>Student</b> top tab &gt; <b>Reports</b> menu</p> <ul style="list-style-type: none"> <li>Use filter called <b>Next School is NOT?</b> &gt; enter part of this school's name.</li> </ul>	<ul style="list-style-type: none"> <li>Permanent Student Records</li> <li>Report Cards</li> <li>BC Attendance History</li> </ul>
	<p>Run school data backup as required by the school.</p>	<p><b>School</b> view</p>	<ul style="list-style-type: none"> <li>See detail in Section 5 of this guide for suggested reports.</li> </ul>
	<p>Ensure master schedule has been created in the build view for next year.</p>	<p><b>Build</b> view &gt; <b>Scenario</b> top tab</p>	<ul style="list-style-type: none"> <li>There should be a schedule for next year. If this screen is blank, refer to the document called <b>Creating a Next Year Schedule – Elementary</b> and complete all tasks.</li> </ul>

## 1.0 Review staff lists and secondary school associations

1. In the **School view**, click the **Staff** top tab and use the  icon to select **All Active Staff**.
2. Review the list of staff:

- a. Note teachers that will not be assigned to this school next year.
- b. Note teachers that will be required at this school next year that are not currently assigned.

Email list of staff leaving and staff coming to district support personnel for maintenance.







Name	StaffID	Type
ZZ-Train1, CAE1	S1039168	Secretary
ZZ-Train2, CAE2	S1039169	Teacher
ZZ-Train3, CAE3	S1039170	Teacher
ZZ-Train4, CAE4	S1039171	Teacher

3. To retain secondary associations for staff that have a different primary school, go to the **Options** menu, and click **Rollover Staff Schools....**





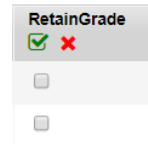
## 2.0 Student Transition Data Review

1. In the **Student** top tab, use the  icon to select the **Primary Active Students** filter.
2. Use the  icon to select the **SD8: Elementary Pre-Transition** field set.
3. Click the **NextSkl > Name** column header to sort the records by the school assigned for next year.
  - a. No students should have a blank value unless they are leaving the school and their destination is unknown.
  - b. Ensure feeder students have a next school value appropriate to the middle or high school they are attending next year.
  - c. Use **Options > Modify List** and click the  icon to open the column for editing. **Note:** If a student is moving to a school in another district, click into the detail of the student record to select an out-of-district school value.
  - d. Adjust values as necessary and save the changes by clicking the  icon at the top of the column *before moving to another column or page*.





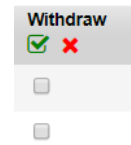
4. Click the **Retain Grade** column header *twice* to sort any “Y” values to the top. It is unlikely there will be any students retained in an elementary school as this field keeps the student in the same grade they are in for the current year.

- a. Use **Options > Modify List** and click the  icon to open the column for editing.
- b. Set any “Y” values to N, as appropriate and save the changes by clicking the  icon at the top of the column *before moving to another column or page*



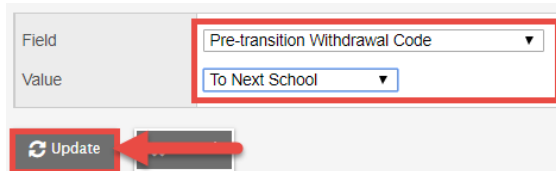
5. Click the **Withdraw** column header *twice* to sort any “Y” values to the top.

- a. Only students who are leaving the school with an unknown destination should have a **Y** value. *In this case, the **NextSkl > Name** field should also be blank.*
- b. Use **Options > Modify List** and click the  icon to open the column for editing.
- c. Adjust values as necessary and save the changes by clicking the  icon at the top of the column *before moving to another column or page*.





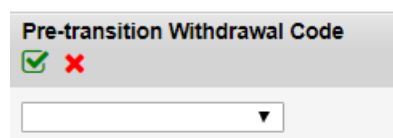
6. **Pre-transition Withdraw Code:** This field should be populated for students who are leaving the school, such as feeder students (going to their high school) and students who are withdrawing to leave the district or a school that does not use MyEducation BC.

- a. Use the **Grade Level = ?** filter to select a grade level of students that are *leaving* the school for feeder schools.
- b. Use **Options > Mass Update** to update the Pre-transition Withdraw Code to **To Next School**.





- c. Set the filter to **Primary Active Students**.

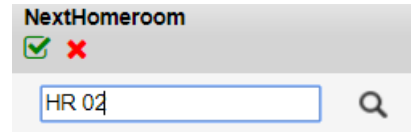
- i. Click the **Withdraw** header *twice* to filter any students with a **Y** to the top. These are students that are leaving the school for an unknown or out-of-jurisdiction school.
- ii. Use **Options > Modify List** and click the  icon to open the column for editing.
- iii. Assign the appropriate pre-transition withdraw code and save the changes by clicking the  icon at the top of the column *before moving to another column or page*.





## 7. Next Homeroom (optional)

- a. Use **Options > Modify List** and click the  icon to open the column for editing.
- b. Use the magnifying glass to select the next homeroom value for the student and save the changes by clicking the  icon at the top of the column *before moving to another column or page*.

**Tip:** Use the **Grade Level = ?** filter to select a grade level of students. As elementary students are commonly grouped into homerooms by grade levels, this will reduce the list and make it easier to select the students to edit.



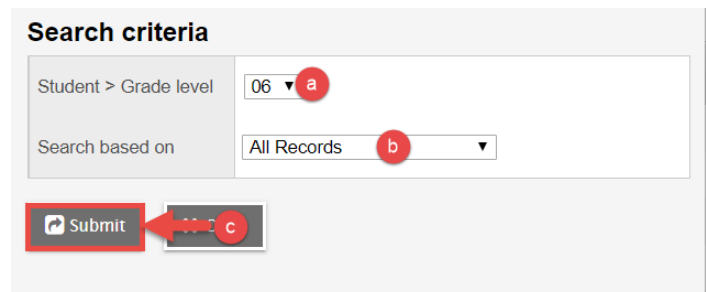
8. In the **Student** top tab, use the  icon to select the **PreReg** Students filter.
  - a. Ensure all **PreReg** students have a next school value assigned in the **NextSkl > Name** field.
  - b. Review all other pre-transition fields to ensure they are set appropriately.
9. In the **Student** top tab, use the  icon to select **Next Year Students**.
  - a. Click the **School > Name** header to sort by *current* school.
  - b. Review the pre-transition settings for student coming from other schools. If the settings appear incorrect, contact the school to have them changed so the student transitions properly.

## 3.0 End-Date General Student Program Assignments

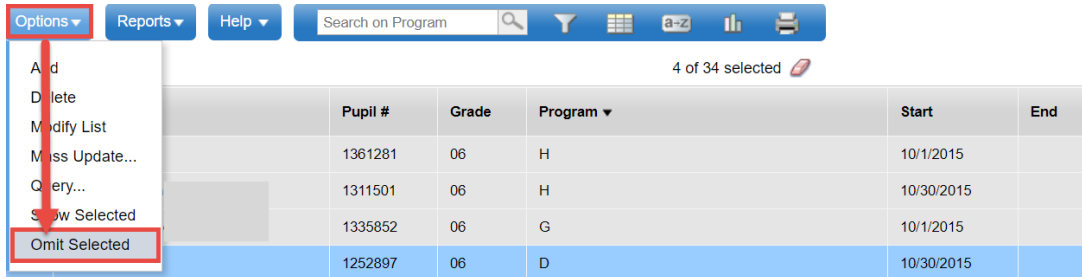
General student program assignments should be end-dated for any students leaving the school. “General” refers to programs like Core French, Aboriginal support programs, FSL, etc. Student services program assignments (ministry designation programs) should not be end-dated.

### Feeder Students

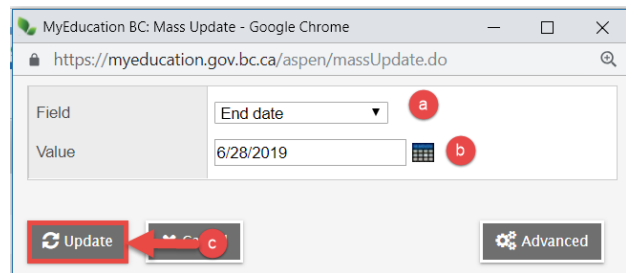
1. In the **Global** top tab, click the **Favorite** side tab.
2. Click the blue hyperlink on the **Student Program Participation** table.
3. Set the field set to **SD8 Programs Field Set**.
4. Set the filter to **End Date Empty for Grade = ?**. In the pop-up window:
  - a. **Student > Grade level:** choose the grade level of feeder students leaving the school.
  - b. **Search based on:** set to **All Records**.
  - c. Click **Submit**.



5. Click the **Program** header to sort student services designations to the top.
  - a. Check the box beside each record that has a student services designation.
  - b. In the **Options** menu, click **Omit Selected** to remove these records from the list.



6. In the **Options** menu, click **Mass Update**.  
In the pop-up window:
  - a. **Field:** set to **End date**.
  - b. **Value:** enter the last date of the current school year.
  - c. Click **Update**.



## Withdrawing Students

1. In the **Global** top tab, click the **Favorite** side tab.
2. Click the blue hyperlink on the **Student Program Participation** table.
3. Set the field set to **SD8 Programs Field Set**.
4. Set the filter to **SD8: Active Students**.
5. Click the **Withdraw** column header twice to filter any records with a **Y** to the top.
6. If all students listed are leaving the school, use **Options > Modify List** to populate the end date with the last day of school for all general programs assigned to these students. (Do not end-date student services programs).

	Name	Pupil #	Grade	Program	Start	End	ProgSch	Withdraw
	Student names blanked for privacy.	1494997	04	Core French	04/09/2018		Brent Kennedy Elementary	Y
	Student names blanked for privacy.	1492855	04	Core French	22/10/2018		Brent Kennedy Elementary	Y



## 4.0 Delete Emergency Contacts for Student Leaving District

1. In the **Student** top tab, check the box beside students who are withdrawing at the end of the year to move outside the district.
2. In the **Options** menu, click **Show Selected**.
3. In the **Contacts** side tab, check the box beside the emergency contacts for the student.
4. In the **Options** menu, click **Delete** to remove the records.
5. Repeat for each student leaving the district.

The screenshot shows a software interface with a sidebar on the left containing 'Details', 'Contacts', 'Related Students', 'Attendance', and 'Conduct'. The 'Contacts' section is active, showing a table with columns: Name, Type, Relationship, LivesWith, and Parent or Guardian?. A red box highlights the 'Options' menu, and a red arrow points to the 'Delete' option. The table contains four rows, with the 'Emergency' row highlighted in blue. A green box highlights the 'Name' column with the text 'Names blanked for privacy.'.

Name	Type	Relationship	LivesWith	Parent or Guardian?
Names blanked for privacy.	Regular Contact	Foster Mother	Y	N
Names blanked for privacy.	Regular Contact	Mother	N	Y
Names blanked for privacy.	Emergency	Friend	N	N
Names blanked for privacy.	Regular Contact	Father	N	Y

## 5.0 Run Reports for Students Leaving

Final report cards and PSRs should be put on file for students leaving the school.

1. In the **Student** top tab, click the **Next School is NOT ?** filter.
  - a. **Next School > Name:** enter a portion of this school's name. (Ex. Brent Kennedy).
  - b. **Search based on:** set to **Primary Active Students**.
  - c. Click **Submit**. Confirm all students leaving the school are in the list.

The screenshot shows a 'Search criteria' form with two input fields and a 'Submit' button. The first field is labeled 'Next School > Name' and contains the text 'brent kennedy'. The second field is labeled 'Search based on' and has a dropdown menu set to 'Primary Active Students'. The 'Submit' button is highlighted with a red box and a red arrow.

2. In the **Reports** menu, run the **Permanent Student Record, report cards**, and any other reports that should be included on the student file before it is forwarded to the next school.

## 6.0 Run Required School Data Backup

The following reports are typically run for data backup and may be stored electronically (in a secure location on a school computer). Check with admin to determine if other information is required.

- **Student** top tab > **Reports** > **Report Cards** > **Kindergarten, Primary, Intermediate.**
- **Student** top tab > **Reports** > **BC Student Information Verification Form**
- **Student** top tab > **Reports** > **Permanent Student Record**
- **Student** top tab > **Other Jurisdiction** > **Enrollment Activity** > use a date range from first day of school to last day of school.
- **Student** top tab > **Other Jurisdiction** > **BC Attendance History**
- **Attendance** top tab > **Daily History** side tab > **Monthly Register**
- **Student** top tab > **Options** > **GDE**
  - Admission/Withdraw Information
  - Curriculum Marks Information
  - ESL Number of Years
  - Emergency Contact Information
  - Medical Information
  - Parent Information
  - Sibling Information
  - Student Daily Absences
  - Student Demographic
  - Student Programs

## 7.0 Confirm Master Schedule in Build View

1. In the settings bar, select **Build view**.
2. Confirm that the school year beside the school name in the upper left corner shows the **next** school year. If it does not, go to the *Creating a Next Year Schedule – Elementary* guide and complete all of the tasks.

Brent Kennedy Elementary 2019-2020

Click the **Scenario** top tab. One record with a schedule for the next school year should show. If no scenario record appears, go to the *Creating a Next Year Schedule – Elementary* guide and complete all of the tasks.

3. Click the blue hyperlink to view the details of the schedule.

- a. **Name:** Give the schedule a name that identifies it as the schedule to be committed in August during school start-up tasks.
- b. **Start date:** This date should represent the first day of school.
- c. **End date:** This date should represent the last day of school.
- d. **Schedule terms:** This value should show 1/1 for elementary schools, representing that all courses are full-year.
- e. Days per cycle: should show 1.
- f. Periods per day: should show 1.
- g. Click **Save** if changes were made.

4. In the **Terms** side tab, click the blue hyperlink on the **FY** schedule term.

- a. Click the **Set date** button to open the date fields.
- b. **Start & End:** enter the first day of school as the start date and the last day of school as the end date.
- c. Click **Save**.

The schedule is committed to the school view as a back-to-school task in the new school year.