



School District 8
Kootenay Lake

Year-End Preparation – High Schools & K- 12

Date: May 8, 2019

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Year-End Preparation Checklist



Detailed instructions for each task follow this checklist if more information is needed to complete the task.

✓	Task	Navigation	Comments
	Review staff lists and secondary school associations.	School view > Staff top tab <ul style="list-style-type: none"> Set filter to All Active Staff 	<ul style="list-style-type: none"> Do not add or delete staff records! Provide district support staff with a list of staff that are no longer associated to this school. Use Options > Rollover Staff Schools to retain staff that have a different primary school.
	Review student secondary school associations (cross-enrolled students)	Student top tab <ul style="list-style-type: none"> set filter to All Secondary Students Global top tab > Favorite side tab > Student School Association table <ul style="list-style-type: none"> set filter to Secondary Students for Year = ? set field set to SD8 Secondary Association Field set <p>Note: During EOYR, secondary associations with no end-date will be given an end date and a new association will be created for the next school year.</p>	<ul style="list-style-type: none"> Review the list of current students with secondary school associations. Select student > Membership side tab > Schools sub-side tab. <ul style="list-style-type: none"> Do not end date associations from other schools without speaking to them first. For students cross-enrolled from this school, (Global top tab steps), populate the end date with the last day of school, if the association ends this year.
	Student transition data review – <u>students under grade 12</u> <p>Note: Grade 12 students are addressed in their own section of this checklist.</p>	School view > Student top tab > <ul style="list-style-type: none"> Set <i>field set</i> to SD8: Mid/High Schools/K-12 Pre-Transition Set filter to Grade Level does NOT = ? > choose Grade level of 12 to retrieve all students under grade 12. <p><u>Tip:</u></p> <ul style="list-style-type: none"> Click the column headers to sort 	<ul style="list-style-type: none"> Next Skl > Name: Ensure all students returning to the school have a value. This field should only be blank if the student is leaving the school and their next school is unknown or out of jurisdiction. Pre-transition Withdrawal Code: Set as appropriate for students <u>under</u> grade 12 who are <i>leaving the school</i>. This field should be blank for all students staying in the school. Dip/SCCP Date: Click the header twice to look for values. This field

✓	Task	Navigation	Comments
		<p>information. This helps to look for blank or incorrect values.</p>	<p>should be blank for all students <i>under</i> Grade 12.</p> <ul style="list-style-type: none"> • RetainGrade: This field should be set to N for all students <i>under</i> grade 12. It is only set to Y if the student will remain in the same grade next year. • Withdraw: This field should be set to N for the majority of students. <ul style="list-style-type: none"> ○ Set the value to Y <u>only</u> for students leaving the school if their destination is unknown or out of jurisdiction. In this case, the Next School field must also be blank. • To be Graduated: This field should be N for all students <i>under</i> Grade 12. • NextHomeroom (optional): If known, students can be assigned a next homeroom value. <p>Set filter to PreReg Students for a list of students, that have been enrolled to begin in the new school year.</p> <ul style="list-style-type: none"> • Ensure these students have the correct value in the NextSkl > Name field. • Check other pre-transition fields, as listed above, for accuracy. <p>Set filter to Next Year Students</p> <ul style="list-style-type: none"> • Students with a next school value of this school will show here, including Pre-Reg students. • Click School > Name header to sort by school. Review pre-transition settings for students coming from other schools. If corrections are required, contact the current school.


✓	Task	Navigation	Comments
	Grade 12 student transition data review	<p>School view > Student top tab ></p> <ul style="list-style-type: none"> • Set <i>field set</i> to SD8: Mid/High Schools/K-12 Pre-Transition • Set filter to Grade Level = ? and select grade 12. <p><u>Tip:</u></p> <ul style="list-style-type: none"> • Click the column headers to sort information. This helps to look for blank or incorrect values. • Use Options > Mass Update to update fields for all grade 12 students before manually adjusting those that are different. 	<ul style="list-style-type: none"> • Next Skl > Name: This field should be blank for all grade 12 students, <u>except</u> grade 12 students who are returning for classes next year. • Pre-transition Withdrawal Code: <ul style="list-style-type: none"> ○ Use Options > Mass Update to update all grade 12 students to Graduated – Dogwood. ○ Use Options > Modify List to manually adjust students to who are on the SCCP program and completing this year to Completion - Evergreen • Dip/SCCP Date: <ul style="list-style-type: none"> ○ Important! Click the column header twice to determine if any students already have a date. If they do, select those records and go to Options > Omit Selected prior to proceeding. ○ Use Options > Mass Update to update all grade 12 students with the last day of school. ○ Use Options > Modify List to manually remove the date for any student that is <u>not</u> graduating. <p><u>Re-set the filter to Grade Level = ? and select Grade 12.</u></p> <ul style="list-style-type: none"> • RetainGrade: Use Options > Modify List to set this field to Y <u>only for grade 12 students that are returning next year.</u> In this case, these students will also need a Next School value.

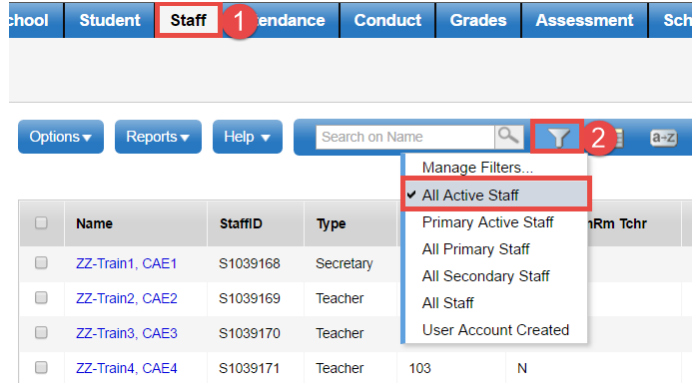
✓	Task	Navigation	Comments
			<ul style="list-style-type: none"> • Withdraw: This field should be set to N for all grade 12 students. The provincial EOYR procedure will automatically withdraw grade 12 students. • To be Graduated: <ul style="list-style-type: none"> ○ Use Options > Mass Update to update all grade 12 students with a value of Y. ○ Use Options > Modify List to manually set the value to N for any student that is <i>not</i> graduating. • NextHomeroom: This field should be blank for all graduating students.
	Review and delete student contact records	<p>Global top tab > Favorite side tab > Student Contact table</p> <p>Note: Instruction for deleting contacts for all grade 12 students are detailed in this document.</p>	<ul style="list-style-type: none"> • For students under grade 12 who are <i>leaving the district</i>: delete emergency contacts. • For students in grade 12: set filter to Non-Parent Contacts for Grade = ? and select Grade 12. Delete all emergency and “other” contacts.
	<p>Review student conduct records and expire, if appropriate.</p> <p>Some schools choose to have conduct records removed when a student leaves the school or district.</p>	<p>Conduct top tab > Incident History side tab</p> <ul style="list-style-type: none"> • Set field set to Expiring Conduct Incidents 	<ul style="list-style-type: none"> • Select records to be expired > Options > Show Selected. <ul style="list-style-type: none"> ○ Mass update the Expiration Date field to the last day of school. • This process means the conduct record will be removed during EOYR.

✓	Task	Navigation	Comments
	End-date general student program assignments for students leaving the school	<p>School view > Global top tab > Favorite side tab > Student Program Participation table.</p> <p>Set field set to SD8 Programs Field Set</p> <p>Note: Do not end-date program assignments that represent student services designations.</p>	<ul style="list-style-type: none"> • Set filter to End Date Empty for Grade = ? <ul style="list-style-type: none"> ○ Select grade 12. ○ Click the Program column header to sort student services designations to the top. Select these records and use Options > Omit Selected to remove them from the list. ○ Ensure all general programs for students leaving the school have end dates. • Set filter to SD8: Active Students <ul style="list-style-type: none"> ○ Click Withdraw header twice to sort Y values to the top. ○ End-date records for students is leaving the school. ○ Do not end date programs that represent student services designations.
	Check for missing final marks and “I”s.	<p>Grades top tab > Transcripts side tab > set  icon to All</p> <ul style="list-style-type: none"> • Set field set to TRAX Quick Check • Set filter to Final Mark is Empty or “I” 	<ul style="list-style-type: none"> • Be patient – the query will take some time to return the records. • The query will return all records missing a final mark, or have a final mark of “I” (incomplete). • Discuss with teachers and administrators to have final marks populated and “I”s changed to valid final marks. <u><i>This must be done prior to final TRAX submission!</i></u>
	Check for missing completion dates	<p>Grades top tab > Transcripts side tab > set  icon to All</p> <ul style="list-style-type: none"> • Set field set to TRAX Quick Check • Set filter to Completion Date is Empty 	<ul style="list-style-type: none"> • Click the Completion Date column header so blank fields filter to the top. • Populate blank completion dates as appropriate.
	Report Cards/PSRs	<p>School view > Student top tab > Reports menu</p>	<ul style="list-style-type: none"> • Run report cards and PSRs for withdrawing students and place copies on file.

✔	Task	Navigation	Comments
	Run school data backup as required by the school.	School view	<ul style="list-style-type: none"> • Suggestion: Options > Exports > GDEs > run with Include Headings checked and store electronically in a secure location.
	Complete all TRAX activities as per the TRAX Guide	Student top tab > Options > Exports Run all TRAX extract files and submit to Ministry	<ul style="list-style-type: none"> • Once verified, check non-grad reports. • Adjust data and re-submit if necessary.
	Complete final SADE Submission	Student top tab > Options > Exports > Student Achievement Data Exchange	<ul style="list-style-type: none"> • Verify data in MyEd BC and complete final SADE submission.
	Label the Build Scenario that will become the committed schedule in the new school year.	Build View > Scenarios top tab > click into the detail of the scenario > name it Schedule to Commit.	<ul style="list-style-type: none"> • Where schools have multiple scenarios, this will help to remember which one should be committed in the new school year.
	Set term dates for the master schedule in the Build Year.	Build view > Scenarios top tab <ul style="list-style-type: none"> • Click into the detail of the scenario to be committed after EOYR • Click the Terms side tab 	<ul style="list-style-type: none"> • For <i>each</i> schedule term, click into the detail <ul style="list-style-type: none"> ○ Ensure Term map boxes are checked correctly. ○ Click the Set date button below the <i>Term map</i> ○ Populate the dates as appropriate

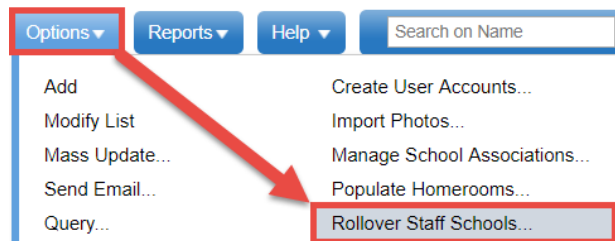
1.0 Review staff lists and secondary school associations

1. In the **Staff** top tab, 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.


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

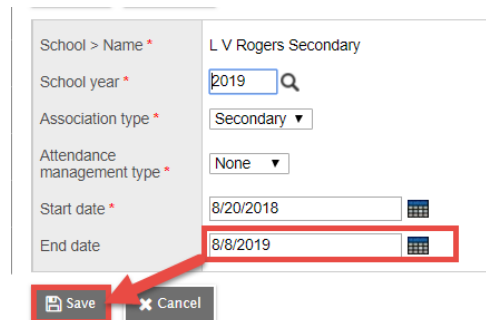


2.0 Review Student Secondary Associations


Student secondary school associations (cross-enrollments) that have a blank end date or an end date past August 1st will have a new association created for the next year. Where students are set to withdraw from their primary school at year-end, but have an association with a blank or future end date, an enrollment status of Active No Primary will occur.

Secondary Students

1. In the **Student** top tab, use the  icon to select **All Secondary Students**. This is a list of all students that are cross-enrolled to this school (have a different primary school).
2. Check the box beside the first student and click the **Membership** side tab.
3. Click the **Schools** sub-side tab to view the secondary school association.
 - a. Look for the record that represents the current year
 - b. Populate the end-date with a date prior to roll-over, if the association will terminate at the end of this school year. **Save** the record.
 - c. Move to the next student using the record navigation bar in the top right corner and continue until all students have been reviewed.




Cross-Enrolled From this School

1. Click the **Global** top tab and select the **Favorite** side tab.
2. Click the blue hyperlink for the **Student School Association** table.
3. Use the  icon to select **Secondary Students for Year = ?**
 - a. **School Year Context > Year ID:** enter the hyphenated value for the current year (ex. 2018-2019).
 - b. **Search based on:** set to **All Records**.
 - c. Click **Submit**.
4. Click the **End** column header to sort by end date. If any end dates are blank or beyond the end-of-year rollover date, ensure that the cross-enrollment is expected to continue into next year.

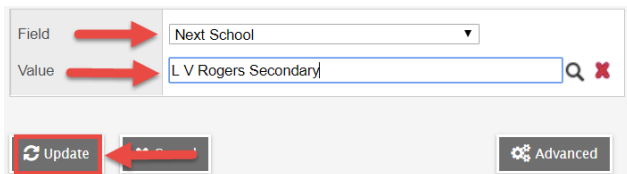
3.0 Student Transition Data Review


Students Under Grade 12

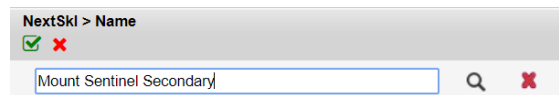
1. In the **Student** top tab, use the  icon to select the **SD8: Grade Level does NOT = ?** filter.
 - a. **Grade level:** use drop-down to select **12**.
 - b. **Search based on:** set to **Primary Active Students**.
2. Set the field set to **SD8: Mid/High/K-12 Pre-Transition**.
3. Click the **NextSkl > 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. Use **Options > Mass Update** to update all Next School values to this school.





- c. Use **Options > Modify List** to manually adjust students attending different schools next year. Click the  icon to open the column for editing.

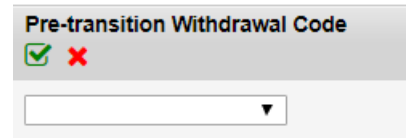


- d. Adjust values as necessary and save the changes by clicking the  icon at the top of the column *before moving to another column or page*.



Note: To assign a school that is outside the district, click into the student's **Detail** screen and set the next school value field there.

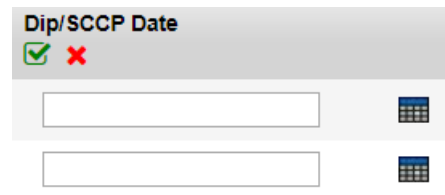
4. Click the **Pre-transition Withdraw Code** header twice to sort students with a value in this field to the top.

- a. Use **Options > Modify List** and click the  icon to open the column for editing.
- b. Assign the appropriate pre-transition withdraw code for students who are leaving the school for an unknown or out-of-jurisdiction school.
- c. Remove the code if the student is not withdrawing from the school. (Also ensure the withdraw flag is set to N).
- d. Save the changes by clicking the  icon at the top of the column *before moving to another column or page*.





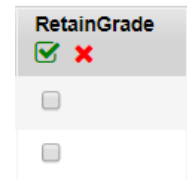
5. Click the **Dip/SCCP Date** header twice twice to sort any fields with a date to the top.

- a. Use **Options > Modify List** and click the  icon to open the column for editing.
- b. Delete any date in the field if the student is not in grade 12 and graduating.
- c. Save the changes by clicking the  icon at the top of the column *before moving to another column or page*.





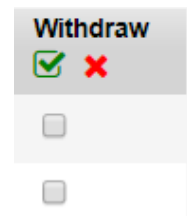
6. Click the **Retain Grade** column header twice to sort any “Y” values to the top. This field should not be set to **N** if the student is expected to enter the next grade level in the new school year.

- 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*.





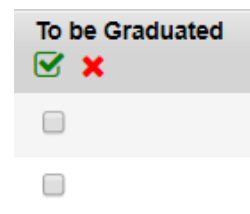
7. Click the **Withdraw** column header twice to sort any “Y” values to the top.

- 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*.





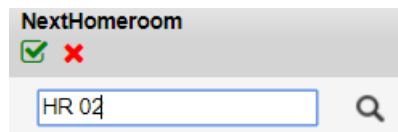
8. Click the **To be Graduated** column header twice to sort any “Y” values to the top. This field should not be set to **N** if the student is not graduating this year.

- c. Use **Options > Modify List** and click the  icon to open the column for editing.
- d. 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*.



9. **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*.




10. 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. Check all other pre-transition fields to ensure they are set appropriately.

11. In the **Student** top tab, use the  icon to select the **Next Year Students** filter.

- c. Click the **School > Name** field to sort by the current school. Check the transition settings for students that are coming from another school during EOYR and make sure they are set correctly. Contact the current school to request changes, if necessary.

Grade 12 Students

1. In the **Student** top tab > set the  icon to **Grade Level = ?**

- a. **Grade level:** Select 12.
- b. **Search based on:** set to Primary Active Students.

2. Set the field set to **SD8: Mid/High/K-12 Pre-Transition**.

- a. **Next Skl > Name:** Students in grade 12 who are graduating should have a blank value unless they are returning to the school to continue courses next year.
- b. **Pre-transition Withdraw Code:**
 - i. Should be **Graduated-Dogwood** for all students who are graduating on a regular graduation program.
 - ii. Should be **Completion – Evergreen** for all students finishing a **School Completion Certificate** graduation program.
 - iii. Should be blank for any grade 12 student who is not graduating. For these students, set the **Retain Grade** value to **Y**. The **Withdraw** value may also be set to **Y** if the student is not returning next year to continue.
- c. **Dip/SCCP Date:** Should be populated for all students who are graduating. It is easiest to use mass update to assign the date to all students, then remove it for students who are not meeting graduation requirements.

- d. **Retain Grade:** Should be **N** for all students who are graduating. Set this flag to **Y** only if the student is not graduating and/or needs to be retained in any school to attend next year. Students with a **Y** should have either a next school value **or** a **Withdraw** flag of **Y**.
- e. **Withdraw:** Should be **N** for all students. Set this flag to **Y** if the student is not graduating and is not returning to any school. Students with a **Y** should have a blank next school value.
- f. **To be Graduated:** Should be **Y** for all students who are graduating. Set this flag to **N** only if the student is not graduating.

The table on the following pages gives a quick reference guide for the possible grade 12 student scenarios and the appropriate transition settings.

Next Year Grade 12 Student Scenarios:	Next School	Pre-Transition Withdrawal Code	Diploma Granted Date	Retained checkbox	Withdraw checkbox	To be graduated
Grade 12 student who is graduating .	BLANK	Graduated-Dogwood or Completion-Evergreen	ENTER DATE	N	N	Y
Grade 12 student who is graduating but returning to this school for additional courses next year.	Set to this school	Graduated-Dogwood or Completion-Evergreen	ENTER DATE	Y	N	N
Grade 12 student is NOT graduating and is returning to the same school next year.	Set to this school		BLANK	Y	N	N
Grade 12 student is NOT graduating but is attending Grade 12 in a different Yukon school next year.	Set to next year school		BLANK	Y	N	N
Grade 12 student is NOT graduating and is discontinuing schooling.	BLANK		BLANK	Y	Y	N
Grade 12 student is on the SCCP graduation program and IS completing the program this year.	BLANK	Completion Evergreen	ENTER DATE	N	N	Y
Grade 12 student is on the SCCP graduation program and is NOT completing the program this year.	Set to this school		BLANK	Y	N	N
Grade 12 student is on the Adult Grad program and IS completing the program this year. <ul style="list-style-type: none"> Set Grade Sub-level to AD 	BLANK	Graduated-Dogwood	ENTER DATE	N	N	Y
Grade 12 student is on the Adult Grad program and is NOT completing the program this year. <ul style="list-style-type: none"> Set Grade Sub-level to AN 	Set to this school		BLANK	Y	N	N



Next Year Grade 12 Student Scenarios:	Next School	Pre-Transition Withdrawal Code	Diploma Granted Date	Retained checkbox	Withdraw checkbox	To be graduated
Grade 12 student withdrawing from their primary school and continuing a secondary school association with another school. Note: This will create a status of Active – No Primary	BLANK	As appropriate.	BLANK, if grad requirements have not been met.	N	Y – Primary School	N, if grad requirements have not been met.

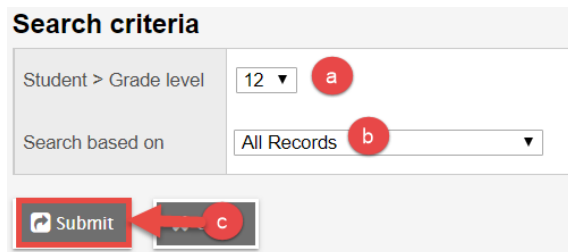
4.0 Other Student Demographics Review

For students leaving the school (withdrawing, transitioning to a new school, or graduating), the following information should also be reviewed.

Contacts

Remove non-parental contacts for all grade 12 students and for students withdrawing to leave the district.



1. In the **Global** top tab, click the **Favorite** side tab.
2. Click the blue hyperlink for the **Student Contact** table.
3. Use the  icon to select the **SD8 Contacts** field set.
4. Use the  icon to select **Non-Parent Contacts for Grade = ?**
 - a. **Student > Grade level:** set to **12**
 - b. **Search based on:** set to **All Records**
 - c. Click **Submit**.

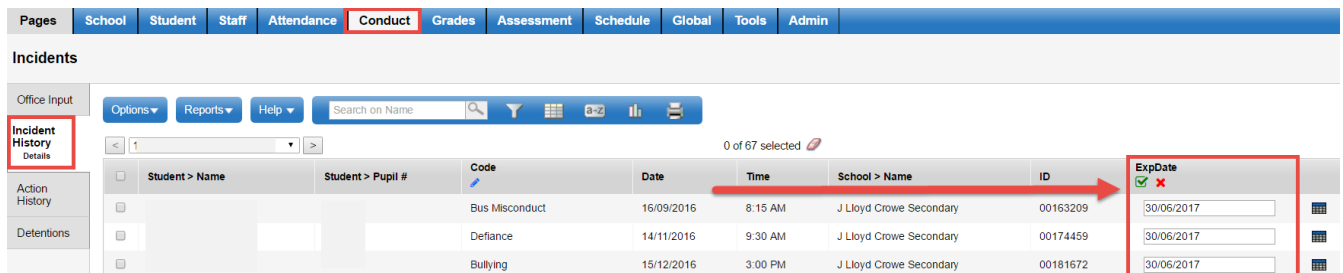


5. Select the records and use **Options > Delete** to remove them.
6. Set filter to Student Withdraws at EOYR. Review records and delete, if appropriate.


Conduct

Conduct records should be reviewed to determine if they should be deleted when the student leaves the school. Consult with school administrator to see if these records should be flagged for deletion.

1. In the **Conduct** top tab, select the **Incident History** side tab.
2. Use the  icon to select the **Expiring Conduct Incidents** field set.
3. In the **Options** menu, select **Modify List**.
4. Use the  icon in the **ExpDate** field to open the field for editing.



Student > Name	Student > Pupil #	Code	Date	Time	School > Name	ID	ExpDate
		Bus Misconduct	16/09/2016	8:15 AM	J Lloyd Crowe Secondary	00163209	30/06/2017
		Defiance	14/11/2016	9:30 AM	J Lloyd Crowe Secondary	00174459	30/06/2017
		Bullying	15/12/2016	3:00 PM	J Lloyd Crowe Secondary	00181672	30/06/2017

5. Enter an expiry date prior to July 15 of the current year to have these records deleted through the end-of-year rollover process. *Be sure to click the  icon before moving to the next page of records or leaving the column!*

End Date General Student Programs



Do NOT end date programs with a 1701 designation code (A, B, C, D, E, F, H, K, P, Q, R). All other general student programs must be end-dated for students *who are leaving the school*. (Core French, Aboriginal Support, etc.)

1. In the **Global** top tab, click the **Favorite** side tab.
 - a. Click the blue hyperlink for the **Student Program Participation** table to see all records.
 - b. Set the field set icon to **SD8 Programs Field Set**.
 - c. Set the filter icon to **End Date Empty for Grade = ?**.
 - i. **Student > Grade level:** set to **12**.
 - ii. **Search based on:** set to **All Records**.
 - iii. Click **Submit**.
 - d. End-date any general student programs. Do not end date programs with a 1701 designation code.
2. Set the filter icon to **SD8 Active Students**.
3. Click the **Program** header to sort designations to the top. Check the box beside designations and use **Options > Omit Selected** to remove them from the list.
4. Click the **Withdraw** column header *twice* to filter any records with a **Y** to the top.
5. 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).



<input type="checkbox"/>	Name	Pupil #	Grade	Program	Start	End	ProgSch	Withdraw ▼
<input type="checkbox"/>	Student names blanked for privacy.	1494997	04	Core French	04/09/2018		Brent Kennedy Elementary	Y
<input type="checkbox"/>	Student names blanked for privacy.	1492855	04	Core French	22/10/2018		Brent Kennedy Elementary	Y

5.0 Review Missing Final Marks and “I”s

All students should have valid final marks for end-of-year reporting.

1. In the **Grades** top tab, click the **Transcripts** side tab.
2. Set the  icon to **All**.
3. Set the  icon to **Final Mark is Empty or “I”**.
4. Review records and consult with teachers and admin about resolving these records.

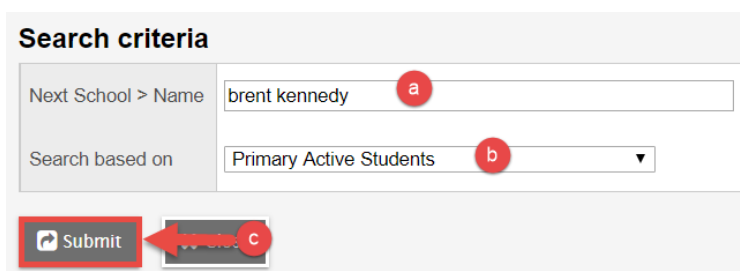
6.0 Review Missing Completion Dates

1. In the **Grades** top tab, click the **Transcripts** side tab.
2. Set the  icon to **All**.
3. Set the  icon to **Completion Date is Empty**.
4. Re-post course dates or manually update records that have a final mark and no completion date.

7.0 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.



Search criteria

Next School > Name **a**

Search based on **b**

Submit **c**

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.

8.0 Complete TRAX and SADE submissions

TRAX and SADE must be exported and submitted at the end of the year. Follow-up on the Ministry Non-grad reports in TRAX is also important to ensure the school is aware of any students that are not in a position to graduate based on the data in MyEd BC.

Correct any data errors and re-submit TRAX to ensure accuracy.

9.0 Build View – Identify the Schedule to be Committed

1. In the **Build** view, click the **Scenarios** top tab.
2. Check the box beside the scenario that will be used in the new year. Click the **Details** side tab.
3. Give the scenario a name of Schedule to Commit.
4. Click **Save**.

10.0 Set Term Dates in the Build Year

1. Change the view to **Build View**.
2. In the build view, click the **Scenarios** top tab.
3. Click the blue hyperlink for the scenario to be committed, so the details are presented.
4. Click the **Terms** side tab. The list of schedule terms will be displayed.
5. Click the blue hyperlink of the first schedule term.
6. Click the **Set date** button to display the term **Start** and **End** dates. Populate these dates as appropriate.
7. Click **Save**. Repeat this process for every schedule term, populating the start and end dates for each, as appropriate.

Note: *Grade term cover maps are irrelevant at this point.* They will need to be re-set after the schedule is committed in the new year.

11.0 Run Required School Data Backup

Some schools may require additional data backup be run. Check with school admin or district support to determine what should be run. Schools commonly run the following reports and general data extracts and store them electronically in a safe place.

Student top tab > Reports

- Report Cards
- Permanent Student Records
- BC Attendance History

Student top tab > Options > GDE

- Admission/Withdraw Information
- ESL Number of Years
- Emergency Contact Information
- Medical Information
- Parent Information
- Sibling Information
- Student Daily Absences
- Student Demographic
- Student Programs