



MyEducationBC

End of Year Rollover

Reference Guide

May 2016 v 3.1

Version History

Version	Date	Description
1.0	01-May-2015	Document created
2.0	2-Jul-2015	Added Fees, Locker, and Transportation information
2.1	20-Jul-2015	Added User Accounts section
3.0	20-Jan-2016	Removed individual movement tables from “Student Movement” sections. Added Student Movement Scenarios section. Added DL & CE Schools Continuing Courses section.
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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1.0 Introduction

End of Year Rollover performs the following actions:

- Moves most students up one grade.
- Assigns Grade 12 students a status of “Graduated”.
 - These students will still have a grade of 12.
- Increases the YOG by +1 for students who have been identified for retention so they remain the same grade for the new school year.
- Moves students to their next school, creating a withdraw record for their current school and an entry record for the new school.
- 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 Schools will no longer have access to students withdrawn from their schools in the previous year.
- Students registered with a Pre-Reg status become Active.

2.0 Student Movement

2.1 Returning Students


Students who do not have a next school value will be retained 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.

2.1.1 Using the Pre-Transition Field Set

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. 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.
 - a. **NextSkl > Name:** This field is populated for students transferring to another school for the next school year. 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. 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.

- b. **Next Homeroom:** This field can be used for organizing students into homerooms for next year, but will not automatically populate the current year Homeroom field through the EOYR process. Schools can copy this value to the current year Homeroom field en masse once EOYR is complete. This process is described in the School Setup document.
- c. **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.
- d. **Diploma Granted Date:** This field can be populated for Grade 12 students who are graduating.
- e. **Retain:** 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 be retained in your school – only that they will be retained in their current grade. The use of this checkbox would be rare in BC.
- f. **Withdraw:** Checking this box indicates that the student is to be withdrawn through the EOYR process. Checking this box is not necessary for students who have a Next School value or for students who are in Grade 12 and are graduating. *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. They will only be withdrawn from their current school.*
- g. **To be Graduated:** Uncheck this box for all grade 12 students who are not graduating.

2.2 Graduating Students

All grade 12 students with an Active or Active No Primary status are considered to have met all graduation requirements will have their status changed to Graduate.


Students remaining in grade 12 to complete course work must have the “Retained” 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’ enrollment status to “Graduate”.
- Only updates Active and Active No Primary students.

Graduated students remain in the same primary school after EOYR but in a Graduated state (similar to withdrawn students). 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  menu, select **Grade level = ?**
2. Set the **Grade level** field to **12**. 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 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 Granted Date**: This field can be populated for Grade 12 students who are graduating. 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. **Retain**: 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.
 - g. **To be Graduated**: Check this box for all graduating students not returning or continuing in another school.

2.3 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 activity.

2.4 Student Movement Scenarios

Student Movement	Next School	Diploma Granted Date	Retained 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 NOT graduating and is returning to the same school next year.	X		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.				X – Primary School	
Pre-Admit student for next school year	X – same school				

2.5 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 that wish to continue secondary school associations for students should review these end dates and update them as appropriate.

End dated on or before Aug 8, 2016	Secondary school association is ended at EOYR
Future end dated - Post EOYR (Oct 26, 2016)	Secondary school association will be ended on the date chosen
No end date	New secondary school association is created for the next school year. (2017)

2.6 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. Pre-Admit dates do not need to be post EYOR as MyEducation handles the Pre-Admit identification through the status of PreReg and not the date.

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. 09/08/2016).
- 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.

3.0 Other Tasks

3.1 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.

3.1.1 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**.

Incident	Actions
Primary code * Teacher Concern Teacher Concern Additional codes Add Incident Date * 9/25/2014 Incident Time <input type="text"/> Location Classroom <input type="text"/> Classroom	Incident ID 00100275 Investigation status N/A Owner > Name <input type="text"/> Referral Staff > Name <input type="text"/> Victim/Target > Name <input type="text"/> Expiration Date <input type="text"/>

3.1.2 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.*

ExpDate
<input checked="" type="checkbox"/> <input type="checkbox"/>
6/30/2015
6/30/2015
6/30/2015
6/30/2015

3.2 Student Journal Entries

Districts or schools that do not wish to have journal entries travel to another school or school year with a student can choose to have these deleted at EOYR.

All journal entries with Delete on Transfer checked will be deleted through EOYR.

3.2.1 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. Check the **Delete on Transfer** box.



Save Cancel
⌵

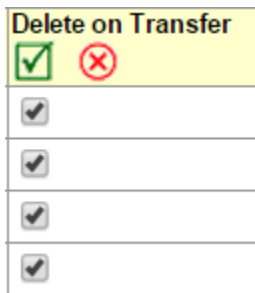
Topic	Test Journal Entry	Type	▼
Date *	5/12/2015	Delete on Transfer	<input checked="" type="checkbox"/>
Time *	3:16 PM	Reason code	<input type="text"/>
Duration in minutes	0	Reporter's name	<input type="text"/>
Author's name	Tester	Reporter Type	▼
Author Type	▼	Is public?	<input type="checkbox"/>
Security Level	<input type="text"/>	Is public?	<input type="checkbox"/>

3.2.2 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.

1. In the **School** view, select the **Global** top tab.
2. Click the **Favourites** 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 **Delete on Transfer Journal Entries** field set.
5. In the **Options** menu, select **Modify List**. Click the  icon to make the fields editable.
6. Check the **Delete on Transfer** checkbox for the records to be deleted at EOYR and *click the green check mark to save.*



3.3 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** field to ensure the association is ended through EOYR.

3.4 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.

3.5 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.

3.6 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.

3.7 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.

3.7.1 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**.

3.7.2 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.

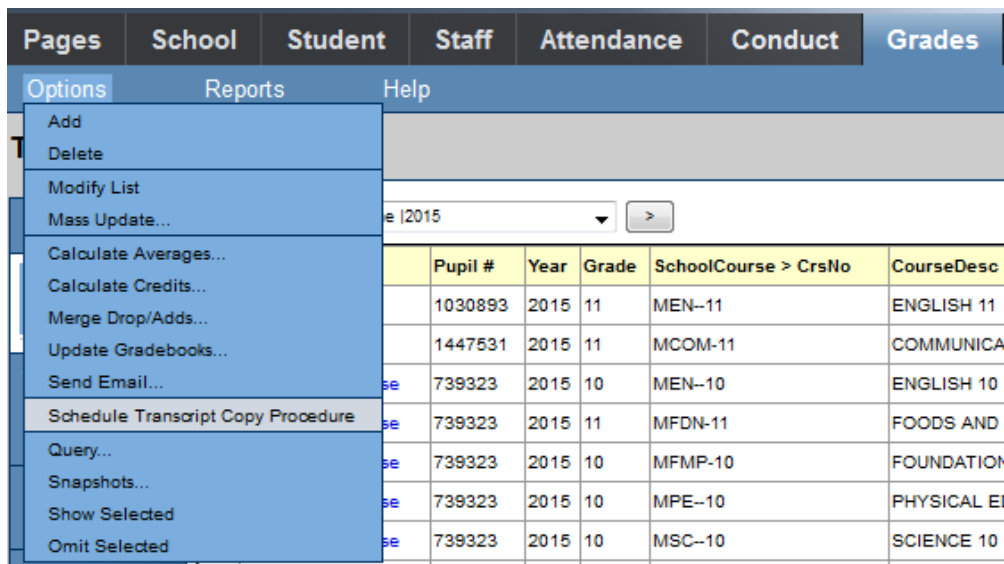
Instructions for exiting students from student services are in the Student Services Processes and Workflows document.

**testing will confirm the behaviour when students are transitioning to schools within and outside of their district.*

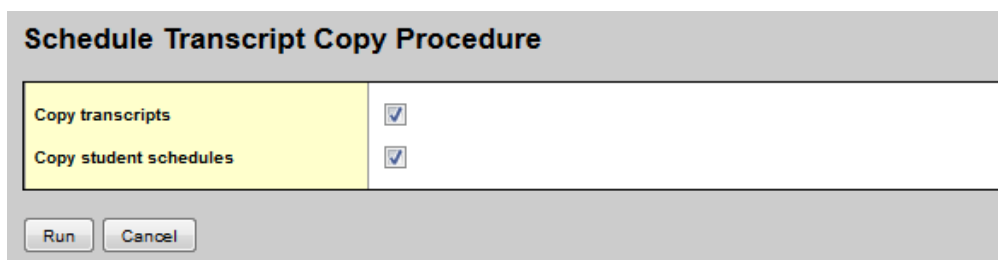
5.0 DL & CE Schools – Continuing Courses

The Copy Transcript procedure provides a method for carrying courses forward to the next school year for students that are continuing their studies. The procedure will look for students enrolled in a course without a final mark. There are two pieces to this procedure. *Copy transcripts* will update the secondary school association for the next year with the important dates from the previous year. *Copy student schedules* will schedule the student into the same course in the next year provided that the matching course and section exist.

Navigation: Grades top tab > Transcript side tab > Options > Schedule Transcript Copy Procedure



Pupil #	Year	Grade	SchoolCourse > CrsNo	CourseDesc
1030893	2015	11	MEN--11	ENGLISH 11
1447531	2015	11	MCOM-11	COMMUNICA
739323	2015	10	MEN--10	ENGLISH 10
739323	2015	11	MFDN-11	FOODS AND
739323	2015	10	MFMP-10	FOUNDATION
739323	2015	10	MPE--10	PHYSICAL EI
739323	2015	10	MSC--10	SCIENCE 10



Schedule Transcript Copy Procedure

Copy transcripts

Copy student schedules

Run Cancel