PowerSchool Start of Year Guide

PowerSchool
Student Information System
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This edition applies to Release 7.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

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Contents

Introduction.............................................................................................................. 2
  When to Use this Guide ...................................................................................... 2
  Who Should Use this Guide ............................................................................... 2
System Administration and Management ............................................................. 2
  Start of Year Backup ......................................................................................... 2
  Disaster Recovery Plan Audit ............................................................................ 2
District and School Administration ........................................................................ 2
  Entry Codes and Exit Codes ............................................................................. 3
  Ethnicity Codes ................................................................................................. 3
  Fees .................................................................................................................. 3
    School Enrollment Fees .................................................................................. 3
    Course Enrollment Fees .................................................................................. 3
School Information ................................................................................................. 4
  PowerLunch Prices and Options ..................................................................... 4
  Default Term Level ............................................................................................ 4
  School Bulletin ................................................................................................. 4
  Substitute Sign In Settings .............................................................................. 4
Scheduling ............................................................................................................ 4
  Years and Terms ............................................................................................... 5
  Periods and Cycle Days ..................................................................................... 5
  Bell Schedule .................................................................................................... 5
  Calendar Setup ................................................................................................... 5
  Pre-Register Students ....................................................................................... 6
  Schedule Pre-Registered Students .................................................................. 6
Attendance ........................................................................................................... 6
  Attendance Codes ............................................................................................. 6
  Attendance Code Categories ............................................................................ 7
  Attendance Conversions ................................................................................... 7
  Full Time Equivalencies (FTE) ......................................................................... 7
  Attendance Preferences ..................................................................................... 7
Grading and Assessment ....................................................................................... 8
  GPA Calculations .............................................................................................. 8
  Final Grade Setup ............................................................................................. 8
  Current Grade Display ..................................................................................... 8
GPA Student Screens ........................................................................................................ 8
Honor Roll Methods and Levels ....................................................................................... 9
Class Rank Methods ......................................................................................................... 9
Reports ............................................................................................................................ 9
User Defined Reports ...................................................................................................... 9
  Example......................................................................................................................... 9
State Reporting ................................................................................................................. 10
Reporting Segments ........................................................................................................ 10
Student Information ......................................................................................................... 10
  Blank Student Field Values .......................................................................................... 10
    Full-Time Equivalency ............................................................................................... 10
    Ethnicity ..................................................................................................................... 10
    Gender ....................................................................................................................... 11
    State Student Number ............................................................................................... 11
Membership Share ........................................................................................................... 11
School Enrollments ......................................................................................................... 11
Apply Credit for Advanced Courses .................................................................................. 12
Enroll Students in Activities ............................................................................................ 12
Update Family Reps ........................................................................................................ 12
Access to the Student and Parent Portals .......................................................................... 13
  Assign IDs and Passwords ............................................................................................ 13
  Enable Student and Guardian Access ........................................................................... 13
  Print Web Access Form Letters .................................................................................... 13
Start of Year Checklist ..................................................................................................... 14
Introduction
This guide addresses several components in PowerSchool that should be revisited prior to starting each new school year. The tasks described in this guide help to ensure that your system is kept up to date year after year.

While the tasks outlined in this guide are not required, many are recommended best practices that will promote a successful school year.

When to Use this Guide
Perform the tasks in this guide after completing the End of Year process for a recently completed school year in PowerSchool.

Who Should Use this Guide
This guide is intended for PowerSchool district administrators whose districts meet the following criteria:

• The PowerSchool End of Year Process is complete for the previous school year
• Students have valid school enrollments for the upcoming school year, having been promoted, demoted, or retained
• Scheduling is complete for the upcoming school year
• Summer school is complete

System Administration and Management

Start of Year Backup
Create and archive a backup of your PowerSchool database. Label this backup accordingly to indicate that the data represents the start of the school year.

Disaster Recovery Plan Audit
Verify that your district has a plan for recovering data in the event of data loss:

• Verify that your backups are being completed as expected
• Review your district’s backup retention strategy
  How many backups should be kept on hand at any given time? How long should backups be kept? Where are backups located? Too many backups kept on-hand can reduce the amount of available disk space on your server. Too few backups kept on-hand can prevent a quick recovery from a data failure. Off-site backups may allow you to recover in the event of a serious hardware failure or environmental damage, such as a flood.

District and School Administration
The following settings affect student configuration and reporting in PowerSchool.
Entry Codes and Exit Codes
District Office Start Page > District Setup > Entry Codes (or) Exit Codes
Review your district’s entry and exit codes setup at the district level. Compare the codes on your server with any codes required by your state/province for reporting purposes. Check with your state’s/province’s reporting documentation to confirm that your entry and exit codes are configured correctly.

Search for and correct student records without valid entry and exit codes. Entry and exit codes can be applied by following the path Start Page > Student Selection > Transfer Info.

Ethnicity Codes
District Office Start Page > District Setup > Federal Ethnicity and Race Settings
Review your district’s federal race categories and district race codes setup. Compare the codes on your server with any codes required by your state/province for reporting purposes. Check with your state’s/province’s reporting documentation to confirm that your ethnicity codes are configured correctly.

Federal race categories are used for state/province reporting. District race codes are used for PowerSchool-specific reports and scheduling.

Search for and correct student records without valid ethnicity codes. Ethnicity codes can be applied at Start Page > Student Selection > Demographics.

Fees
If your district uses PowerSchool’s fee system, review your district’s school enrollment fees and course enrollment fees.

School Enrollment Fees
District Office Start Page > District Setup > Schools/School Info > [School Name] > (Setup)
Start Page > Special Functions > Fee Functions > Assess School Enrollment Fees > (Assess)
School enrollment fees may be assessed using the fee group functions. Note that school enrollment fees are year-specific. While all school enrollment fees are displayed on the Edit School page, only school fees for the current school year are assessed.

Course Enrollment Fees
Start Page > School Setup > Courses > (Setup)
Start Page > Special Functions > Fee Functions > Assess Course Enrollment Fees > (Assess)
If course enrollment fees are properly set up prior to enrolling students into their courses for the upcoming school year, they will be assessed automatically as students are enrolled into their courses. However, if course enrollment fees are not assessed automatically, they may be assessed using the fee group functions.
School Information
District Office Start Page > District Setup > Schools/School Info
Review and update the information for each school in your district, including the school’s address, contact information, school administration information, county information, and school fee information.

PowerLunch Prices and Options
Start Page > PowerLunch > Set Prices and Options
If your school uses PowerLunch, review and update the PowerLunch prices and options.

Default Term Level
Start Page > School Setup > Miscellaneous
Set the default term level to one of the earlier terms in the year such as Q1 (Quarter 1) or S1 (Semester 1). This setting determines the term level displayed by default at the top of the page when in PowerSchool.

School Bulletin
Start Page > Special Functions > Daily Bulletin Setup
The Daily Bulletin is cleared as part of the End of Year Process. Set up any school bulletin items for the beginning of the school year.

Substitute Sign In Settings
Start Page > School Setup > Sub Sign In Settings
To prepare for the substitute teachers who will be working at the schools in your district, set up the sign-in information they’ll use to access PowerTeacher Substitute at each school. On the Substitute Sign In Settings page, enter the password you want substitutes to use. The password you choose depends on the school’s policy, but keep in mind that it is school-specific and is used by all of the subs at the school on any given day to access PowerTeacher Substitute only.

You can elect to use the same password every day or you can change it manually to something new every day. Or, you can elect to include the current date as a prefix to the password you enter in the Substitute Sign In Password field. That way, the prefix will change every day, causing the password to be different day-to-day.

Scheduling
The following settings affect the scheduling of both school and course enrollments for students in PowerSchool.
**Years and Terms**

Start Page > School Setup > Years & Terms

Verify the start and end dates of the scheduling terms. Schedule terms define dates for scheduling students into school and sections/classes.

If you identify incorrect dates for the full year term, check student records for similar date discrepancies in school enrollment records on the Transfer Info student screen and course enrollments for year-long classes on the All Enrollments student screen.

If you identify incorrect dates for the smaller scheduling terms, check student records for course enrollment date discrepancies on the All Enrollments student screen.

**Periods and Cycle Days**

Start Page > School Setup > Periods
Start Page > School Setup > Days

Periods and cycle days are initially copied from the previous school year upon creating the year term for a new school year. However, if you used PowerScheduler or the Copy Master Schedule function to create your schedule, your periods and cycle days may have been overwritten by the information in PowerScheduler or the information from the source year using Copy Master Schedule.

**Bell Schedule**

Start Page > School Setup > Bell Schedules

Bell schedules are copied from the previous school year upon creating the year term for a new school year. Review each bell schedule for the following items:

- Confirm that each bell schedule has an attendance conversion method
- Confirm that the correct periods are assigned to each bell schedule
- Set periods to count towards ADA when appropriate
- Select a period to use for Daily Attendance, i.e. an attendance bridge period, in each bell schedule if meeting and daily attendance are recorded at your school

**Calendar Setup**

Start Page > School Setup > Calendar Setup

The school calendar day records are generated upon creating the year term for a new school year. However, if you used PowerScheduler or the Copy Master Schedule function to create your schedule, your school calendar dates may have been updated by the information in PowerScheduler, or the information from the source year using Copy Master Schedule.

Review your school calendar for the following items:

- Ensure that each in-session school day is assigned the appropriate membership value
  
  This value is usually set to 1, but may differ for special school days such as half days, which may have a membership value of .5.

- Ensure that any school day with a positive membership value is assigned the correct in-session status
In most cases, days that are in-session also have a positive membership value. However, your state/province may have specific days that deviate from this practice for state/province reporting purposes.

- Ensure that each in-session day is assigned a bell schedule and a cycle day

**Note:** Review the PowerSchool documentation specific to your state/province before configuring your school calendar. Your state/province may have special rules with regard to the configuration of specific calendar day types.

### Pre-Register Students

Start Page > Enroll New Student

You can pre-register new students before the new school year begins. When you pre-register students, enter the date of the first day of the upcoming school year as the enrollment date. Pre-registering students correctly creates a student record with an inactive enroll status of -1. It also creates a pending enrollment that will become active during the nightly process at 12 AM on the enrollment date you entered.

### Schedule Pre-Registered Students

Start Page > Search for the student > Modify Schedule

Schedule pre-registered students manually by using the Modify Schedule – Enrollments student page to find and select available courses. Use the date of the first day of the upcoming school year as the Effective Enrollment Date.

### Attendance

The following settings affect the calculation of attendance and membership in PowerSchool.

### Attendance Codes

Start Page > School Setup > Attendance Codes

Attendance codes are copied from the previous school year upon creating the year term for a new school year. Review the attendance codes at each school for the following:

- Confirm that each attendance code has an appropriate presence status (present or absent)
  
  For example, the present and tardy attendance codes would usually both have a presence status of “Present.” The absent, unexcused, or vacation attendance codes usually have a presence status of “Absent.”

- Confirm that each attendance code is configured properly to count in or be excluded from ADA calculations

- Confirm that each attendance code is set properly so that teachers may or may not assign that attendance code in PowerTeacher

- Confirm that the present attendance code has a blank code and is ranked first
**Attendance Code Categories**

Start Page > School Setup > Attendance Code Categories

Attendance code categories are copied from the previous school year upon creating the year term for a new school year. Review the attendance code categories to ensure that each school has a Tardy category for attendance. This category is used for all attendance codes that should be counted as tardy.

**Attendance Conversions**

Start Page > School Setup > Attendance Conversions

Attendance conversions are copied from the previous school year upon creating the year term for a new school year. Review the attendance conversions to ensure that each attendance conversion is fully defined for the default method (period to day, code to day, or time to day) for each FTE. For example, if you have two attendance conversion methods, and three FTEs defined at your school, you must fully define at least six attendance conversion calculations.

**Full Time Equivalencies (FTE)**

Start Page > School Setup > Full Time Equivalencies (FTE)

Full Time Equivalencies (FTEs) are copied from the previous school year upon creating the year term for a new school year. Review your FTEs for the following:

- Ensure that each FTE has a default attendance mode
- Ensure that each FTE has a default attendance conversion method such as Period to Day, Code to Day, or Time to Day

**Attendance Preferences**

Start Page > School Setup > [Attendance] Preferences

Attendance preferences are copied from the previous school year upon creating the year term for a new school year. Review your attendance preferences for the following:

- Ensure that the correct attendance recording methods are set
- Set one-way or two-way synchronization for the meeting and daily attendance bridge if your school records both meeting and daily attendance
- Set the number of school days before and after the current date during which teachers can enter attendance
- Set the calculation accuracy for ADA and ADM values
- Determine whether attendance recorded at another school counts for students at the current school
- Determine whether present codes (positive attendance) or absent codes (negative attendance) are used for the period conversion
  
  Negative attendance is the most common, although some states, such as California, may require positive attendance.
- Determine whether PowerSchool should round or truncate ADA and ADM values when calculating attendance
• Choose whether to enable or disable passing time deductions if using a daily, time-to-day conversion

**Grading and Assessment**

The following settings affect the calculation and display of current and historical grades in PowerSchool.

**GPA Calculations**

District Office Start Page > District Setup > GPA Calculations

Review the GPA calculations setup at the district for any term-specific information. For instance, a GPA calculation may be set up to only include grades from a certain school year. If you wish to use the same GPA calculation for the current year, you may have to adjust the school year settings for that GPA calculation, or create a new GPA calculation.

**Final Grade Setup**

Start Page > School Setup > Final Grade Setup

Set up final grade reporting terms for each school. Final grades define the length of each grading period for a particular scheduling term. The start date and end date of a grading term determine which gradebook scores (assignments, tests, projects, etc.) are included in a particular final grade. Be sure to work with your administrators to set final grade deadlines once final grade setup is complete. Several final grade setup tutorials are available on PowerSource in the PowerSchool knowledgebase.

**Current Grade Display**

Start Page > School Setup > Current Grade Display

Current grade display settings control the grade display on the Quick Lookup student screen as well as the current grade display throughout PowerSchool. The following settings should be updated at the end of each reporting term throughout the school year:

• Update the columns to display on the Quick Lookup student screen

• Update the source of data for each column so that grades are initially returned from the gradebook (current grades) instead of stored grades

• Update the Current Grade field

• Update the Parent/Student Access Term field

**GPA Student Screens**

Start Page > School Setup > GPA Student Screens

The settings on the GPA Student Screens setup page determine which GPA calculation method is used for the current GPA on the Quick Lookup student screen and which data is displayed on the Cumulative Information student screen.

Verify the following settings at the start of the school year:

• If needed, update the GPA calculation method to be used as the current GPA on the Quick Lookup student screen
Review any of the data access tags used in each of the 10 rows for the Cumulative Information student screen, then update any term-specific data access tag attributes if necessary.

This is common with data access tags related to attendance and GPAs.

**Honor Roll Methods and Levels**

Start Page > School Setup > Honor Roll

Configure honor roll methods and levels at each school. The grades included in the honor roll calculations are based on the associated GPA calculations setup at the district office.

At the start of the school year, review the GPA Calculation associated with each honor roll level and ensure that the calculation is configured properly for the current school year. GPA calculations are configured at District Office Start Page > District Setup > GPA Calculations.

**Class Rank Methods**

Start Page > School Setup > Class Rank > Class Rank Methods

Configure class rank methods at each school. Class rank is used to rank students based on GPA. Setting up class rank involves selecting or setting up a GPA calculation method at the district, defining a class rank method at the school and calculating the class rank at the school.

At the start of the school year, review each class rank method and ensure each is associated to the correct GPA calculation method. GPA calculations are configured at District Office Start Page > District Setup > GPA Calculations.

**Reports**

The following settings affect user-definable reports and state/province reports.

**User Defined Reports**

Start Page > System Reports > Setup tab

Object reports, form letters, and report cards are all user-definable reports that often contain term or year-specific information in data access tags.

At the start of the school year, review the elements used in each report to ensure any term-specific information has been updated for the current school year or the current term if you wish to use that report during the new school year.

**Example**

The `^(*gpa)` data access tag can be used in a report card footer to return a student’s GPA based on a specific method. It is possible to specify a year in which to query grades for the GPA calculation. If any of your reports include the `^(*gpa)` data access tag with a year parameter, update the year value accordingly for the upcoming school year. The following instance of the `^(*gpa)` data access tag will return a GPA value using the “Simple” method and will only include grades from the 2010-2011 school year.

`^(*gpa method=“simple” year=“2010”)`
State Reporting
Start Page > System Reports > State tab
Review the guides available for your state/province to ensure your schools and district are setup correctly for any updated state/province requirements. State/province reporting guides are available on PowerSource. Commonly updated state/province reporting requirements include:
- Attendance Codes
- Attendance Code Categories
- Entry Codes
- Exit Codes

Reporting Segments
Start Page > School Setup > Reporting Segments
If your school uses reporting segments for non-monthly reports, such as the Enrollment By Grade report, update the reporting segments to reflect the dates for the new school year. Reporting segments typically contain 20 in-session school days, starting with the first day of the year. You can create shorter or longer segments to best suit the school’s reporting needs, but just make sure the dates fit within the school year and there are no gaps between segments.

Student Information
The following settings affect several reports and functions throughout PowerSchool.

Blank Student Field Values
Review student records periodically for blank or invalid values in commonly required fields. Student records with missing information may often lead to unexpected results in various PowerSchool reports.

Full-Time Equivalency
Search for students without a full-time equivalency. If any students are returned, update their current school enrollment on the Transfer Info student screen with an FTE. Students without an FTE will cause invalid ADA calculations.
1. Perform the following search on the Start Page: FTEID=.
2. If PowerSchool returns one or more students, update each student record and assign the student an appropriate FTE on the Transfer Info student screen.

Ethnicity
Search for students without an ethnicity. If any students are returned, update their ethnicity value on the Demographics student screen. Students without an ethnicity value will often cause issues with state/province reports and the Enrollment Summary report.
1. Perform the following search on the Start Page: ethnicity=.
2. If PowerSchool returns one or more students, update each student record and assign the student an appropriate ethnicity value on the Demographics student screen.
Gender
Search for students without a gender value. If any students are returned, update their gender on the Demographics student screen.

1. Perform the following search on the Start Page: gender=.
2. If PowerSchool returns one or more students, update each student record and assign the student an appropriate gender value on the Demographics student screen.

State Student Number
Search for students without a state student number. The state student number ([students]state_studentnumber) determined by the state is often different than the local student number ([students]student_number) assigned by the school or district. If any students are returned in your search, update their state student number on the appropriate state-specific student screen.

1. Perform the following search on the Start Page: state_studentnumber=.
2. If PowerSchool returns one or more students, update each student record and assign the student a valid state student number value on the appropriate state-specific student screen.

Membership Share
Ensure that students have a valid Membership Share value in the [1]MembershipShare field. Most students have a membership share value of 1. However, some students that attend school for a smaller-than-normal portion of the school day may have a reduced membership share value. This is common for students in kindergarten who only attend half of the regularly scheduled school day. Consult the appropriate state/province reporting guide to determine if your state/province has any special requirements for membership share. Students with a membership share value of 0 will be excluded from membership calculations at your school.

See the PowerSchool Knowledgebase for instructions on updating the membership share for a student. Note: While the MembershipShare field is not exposed on student pages, it may be updated via DDA, the Student Field Value function, or on a custom page.

School Enrollments
Start Page > System Reports > School Enrollment Audit
Run the School Enrollment Audit report to identify any invalid school enrollments. School enrollments may be updated on the Transfer Info student screen.

- Each exit date represents the day after the last day of membership for a given school enrollment
- Verify that students do not have any school enrollments that overlap; however, the exit date for one enrollment may be the beginning date for another enrollment.
- Verify that students do not have any school enrollments that are outside of a valid school year; however, the exit date for a school enrollment may be the day after the last day of the school year.
Apply Credit for Advanced Courses

Start Page > Search for the student > Historical Grades > Detail View

Some students take advanced classes in 8th grade for high school credit. You can apply the credit the students earned for the advanced courses before they begin 9th grade so that it will be included on their high school transcripts. Assuming that the grade for the course was stored at the middle school, you can access the student’s historical grade record at the high school and change the historical grade level in which the advanced course was taken.

Enroll Students in Activities

When you prepared to run the End of Year process at the end of the last school year, you cleared students who were enrolled in extra-curricular activities (such as football, soccer, band, and student council) from the system. During the Start of Year process, you can enroll students into activities prior to the first day of the new school year, provided you have the activity rosters ahead of time.

To enroll an individual student in an activity:

Start Page > Search for the student > Activities

1. Select the activity check box.
2. Click Submit.

To enroll a group of students in an activity:

Start Page > Select a group of students > Group Functions > Student Field Value

1. Enter the field name associated with the activity as the Field To Change.
2. Enter 1 as the New Field Value.
3. Click Submit.

Update Family Reps

If more than one student from the same family attends the same school, one of the siblings can be designated as the family rep. That way, when school correspondence gets mailed home, parents and guardians will only receive one copy of the letter rather than one for each student. Keep in mind that if a school decides to use family representatives, then one student from each family must be designated as the rep, even if the student is an only child or has no siblings at the school.

Before the first day of school, make sure students have the correct family rep designation. Designating the youngest sibling as the family rep is recommended because that student will remain in the system the longest.

Change the family rep field value for an individual student on his or her Modify Info page. Use the Student Field Value group function to change family_rep values for a group of students.

To remove the family rep designation for a group of students:

1. Perform the following search on the Start Page: family_rep=1.
2. Use the Student Field Value group function.
3. Enter family_rep as the Field To Change.
4. Check Clear Field Value.
5. Click Submit.
To add the family rep designation for a group of students:

1. From the Start Page, select the group of students.
2. Use the Student Field Value group function.
3. Enter `family_rep` as the Field To Change.
4. Enter 1 as the New Field Value.
5. Click Submit.

### Access to PowerSchool Student and Parent Portals

After completing a school year, it is common for PowerSchool administrators to disable student and guardian access to the PowerSchool Student and Parent Portals while school is not in session (during the summer months). Use the ID/Password Assignment group function to generate user names and passwords for new students and guardians, and to enable student and guardian access to the Student and Parent Portals for the upcoming school year.

Start Page > Select a group of students > Group Functions > ID/Password Assignment

#### Assign IDs and Passwords

1. Check Don’t overwrite any existing IDs or passwords.
2. Check Assign Student Usernames and passwords.
3. Check Assign Access IDs and passwords.

#### Enable Student and Guardian Access

4. Check Enable access accounts for processed students.
5. Check Enable access accounts for processed parents.
6. Click Submit.

### Print Web Access Form Letters

Send out letters to all new students, and their guardians, to inform them about the PowerSchool Student and Parent Portals and to provide them with their sign-in information. Keep in mind that, if you only updated sign-in information for new students and guardians, you may not need to send out form letters to everyone. However, school or district policy may dictate that letters be sent to both new and returning students, and their guardians.

Start Page > Select the group of students > Group Functions > Print Report > Select the form letter > Submit > Print
Start of Year Checklist

Use the following checklist to track your progress through the Start of Year tasks referenced in this guide.

☐ System Administration and Management
  ☐ Create Start of Year Backup
  ☐ Audit Disaster Recovery Plan

☐ District and School Administration
  ☐ Review Entry, Exit, and Ethnicity Codes
  ☐ Review Fees
  ☐ Verify Assessment of Automatic Fees
  ☐ Review and Update School Information
  ☐ Review PowerLunch Prices and Options
  ☐ Update the Default Term Level
  ☐ Update the School Bulletin
  ☐ Set Up Sub Sign In Settings

☐ Scheduling
  ☐ Review Years and Terms
  ☐ Review Periods and Cycle Days
  ☐ Review Bell Schedules
  ☐ Complete Calendar Setup
  ☐ Pre-register Students
  ☐ Schedule Pre-registered Students

☐ Attendance
  ☐ Review Attendance Codes, Categories, and Conversions
  ☐ Review Full Time Equivalencies
  ☐ Review Attendance Preferences

☐ Grading and Assessment
  ☐ Review GPA Calculations
  ☐ Complete Final Grade Setup
  ☐ Set Final Grade Deadlines
  ☐ Update Current Grade Display
  ☐ Update GPA Student Screens
  ☐ Review Honor Roll Methods and Levels
  ☐ Review Class Rank Methods

☐ Reports

Start of Year Checklist
Start of Year Checklist

- Update DATs in User Defined Reports
- Review State Reporting Guides
- Update Reporting Segments

- **Student Information**
  - Update Missing Student Information (FTE, Gender, Ethnicity, State Student Numbers)
  - Verify Membership Share
  - Verify School Enrollments
  - Apply Credit for Advanced Courses
  - Enroll Students in Activities
  - Update Family Reps

- **Access to PowerSchool Student and Parent Portals**
  - Assign IDs and Passwords
  - Enable Student and Guardian Access
  - Print Web Access Form Letters for Students and Guardians