EOY Checklist

04/07/2025 7:06 am EDT

The EOY Process below is a living process and is subject to changes as NCDPI determines best practices for End of Year.

> ℹ️ If Part 1 of the Scheduling Workflow has been completed, refer to the 'Before the Last Day of School' section as a double check.

Before the Last Day of School

Task	☑ Completed
School Year and Calendar	
Create the future School Year.	☐
Create the future year school calendar(s)	☐
Create the future year program calendars	☐
Checks and Updates ***Make sure the calendar context is the future year!**	
Grade Levels	☐
Term Setup	☐
Period Setup	☐
Day Setup	☐
School Months	☐
Future Enrollments	
School Calendar Student Enrollment Roll Forward	☐
Program Calendars Student Enrollment Roll Forward	☐

Task	☑ Completed
Enrollment Cleanup Wizard *Make sure the calendar context is the future year! Run weekly!	☐
Pre-Register Students *Make sure the calendar context is the future year!	☐
Additional	
EDDIE Updates (if applicable)	☐
Online Registration Updates (if applicable)	☐

After the Last Day of School

Task	☑ Completed
Final Grading	
Post Grades	☐
Final Report Cards	☐
Post Transcript Grades	☐
Grade Suppression (if applicable)	☐
Class Rank (if applicable)	☐
Final Transcripts (if applicable)	☐
Graduates (if applicable)	
Graduation Checklist (if applicable)	☐
Retentions	
Create Retention Filter (use for ending enrollments)	☐
End Retention Enrollments	☐
Enrollment Processes	

Task	☑ Completed
Last Instructional Day Check	☐
End Enrollments *Roll forward all enrollments before ending current year enrollments	☐
End Program Assignments	☐
Enrollment Cleanup *Make sure the calendar context is the future year! Run weekly!	☐
Reporting and Billing	
End of Year Fees (if applicable)	☐
State Reports	☐
Local PSU final reports	☐
Pause Automated Tasks	☐
Administrative	
Staff Records	☐
Access Management	☐
Record Retention	☐
Locker Assignments (if applicable)	☐
Scheduling	
Scheduling Board (if applicable)	☐
Future Year Schedule Active and Locked	☐
Update Active Year	
DPI will switch the active year to the new future on June 30th.	☐