After Last Day of Current Year

06/23/2025 12:41 pm EDT

Post Grades

- Consider only opening only one term/task grading window at a time to prevent accidental posting errors.
  - Grading Window | Infinite Campus (https://kb.infinitecampus.com/help/grading-window)
- Verify all student final grades have been posted by teachers.
- Generate the Grades Report (Grading and Standards) | Infinite Campus (https://kb.infinitecampus.com/help/grades-report-grading-and-standards) to review missing grades. The same report can be used to review all final grades are per PSU policies.
  - Run this daily during the grading window to ensure grades are posted accurately.

Grades Report ☆

Grades Batch Report

This report will batch print students' grades. There is an option to print the report grouped by student, teacher or course. There is an option to set a page break for each student or course, suitable for handing out. The grades report group by Teacher will always set a page break for each teacher. This is a very complex report, so try to limit the number of students run per batch. Checking the page break option will make the report run faster.

Which students would you like to include in the report?

◉ Grade

All Students
PK
TK
KG
1

○ Ad Hoc Filter

Grading Terms   ☐ Q1 ☐ Q2 ☐ Q3 ☐ Q4

Select Teachers

All
BAIR, Eloisa
BAKER, LAURA
BOLICK, Bobbie
BOLICK, Loraine
Brown, PATRICIA
Bryant, JENNIFER
BUMGARNER, Kathleen

Group By   ◉ Student ○ Teacher ○ Course/Section
☑ Display term dates
☑ Display section dates
☐ Set page break for each Student

Select Standard/Grading Tasks

All
Term Grade
Semester Grade
Final Grade

◉ All Grades / Scores
○ Missing Grades / Scores
○ By Grade / Score

[Generate Report]

Final Report Cards

Grading & Standards > Reports > Report Card

- Generate Final Report Card | Infinite Campus (https://kb.infinitecampus.com/help/report-card) for distribution.
- Follow PSUs procedures on required information for the final report card. Report Setup | Infinite Campus (https://kb.infinitecampus.com/help/report-setup)

Post Transcript Grades

Student Information > General Student Administration > Transcript Post Wizard

- Be sure grading windows are closed before posting final grades to the transcript.

- Verify that all final grades are posted by teachers prior to posting final grades to the transcript.

- Post student final grades to transcripts using the Transcript Post Wizard (https://kb.infinitecampus.com/help/transcript-post) (if applicable).

- Select all child credit groups when posting transcript grades.

- It is a PSU decision on posting score comments.

- Posting transcript grades can be done multiple times without duplicating or overwriting existing transcript records. Only new transcript grades will be added.

Grade Suppression (if applicable)

Student Information > General > Transcripts

- Complete Grade Suppressions per PSU procedures.
- Review the Suppressed Grades (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/adding-transcript-grades#SuppressedGrades) article for steps on how to process grade suppressions.

Class Rank (if applicable)

Grading & Standards > Reports > Class Rank Report

- Review Class Rank Report | Infinite Campus (https://kb.infinitecampus.com/help/class-rank-report) for each grade level for accuracy.
- Once class rank has been reviewed, determine the date to save a final year report for class rank.

Class Rank Report ☆

Grading & Standards > Reports > Class Rank Report

GPA Rank report

This report calculates a student's class rank based on their cumulative GPA.

Which students would you like to include in the report?

Grade 06

Enrollment Effective Date: 10/23/2024

GPA Calculation: Cumulative GPA

GPA Calculation Type: Weighted GPA

How would you like the report sorted?

○ Student Name   ● Rank

Report Format: PDF

Generate Report

Final Transcripts

Final Transcripts (if applicable)

Grading & Standards > Reports > Transcript Batch Report

- Generate transcripts for all students.
- Be sure all steps in the graduation checklist have been completed before generating final transcripts for graduates.
- E-Transcripts will be processed once the diploma date has been updated in a student's graduation tool. Schools must have information complete and diploma dates added within 10 days after the last instructional day of the school year.

Transcript Batch Report ☆

Transcript Batch Report

This report will batch print student transcripts, one per mailing address per student. To print one transcript per student when students have multiple mailing addresses, check the box labelled "Transcript without mailing address, one per student". If a calendar is selected in the toolbar, the transcript will only show marks earned in grade levels present in that calendar. This is a very complex report; try to limit the number of students run per batch.

Report Options   [North Carolina Official Transcript ▾]
OR
Display Options

Which students would you like to include in the report?

◉ Grade
```
TK
9
10
11
12
```

◯ Ad Hoc Filter [▾]
Enrollment Effective Date [04/03/2025 ▦]

Sort Options   ◉ Alpha   ◯ Grade/Alpha   ◯ Zip   ◯ Teacher
☐ Transcript without mailing address, one per student

[Refresh] Show top [50 ▾] tasks submitted between [03/27/2025 ▦] and [04/03/2025 ▦]

Batch Queue List

Queued Time	Report Title	Status	Download

Report Format: [PDF ▾]

[Generate Report] [Submit to Batch]

End of Year Graduate

Below are steps to complete the graduation process for multiple students at the end of the school year.

Task	☑ Completed
Post Grades to Transcript *Menu > Student Information > General Student Administration > Transcript Post Wizard* • Transcript Post Wizard | Infinite Campus (https://kb.infinitecampus.com/help/transcript-post)	☐

Task	☑ Completed
Verify Graduation Program is assigned *Menu > Student Information > Academic Planning > Programs* • Graduation Program Assignment (https://ncdepartmentofpublicinstruction.knowledgeowl.com/66ce6d8e9af087bcad002936/language/en/version//home/graduation-program-assignment)	☐
Verify CTE Programs are assigned (if applicable) *Menu > Student Information > Academic Planning > Programs* • CTE Program Assignment (https://ncdepartmentofpublicinstruction.knowledgeowl.com/66ce6d8e9af087bcad002936/language/en/version//home/cte-program-assignment)	☐
Calculate On-Track Status *Menu > Student Information > Program Administration > Course Plan Administration* • Course Plan Administration | Infinite Campus (https://kb.infinitecampus.com/help/course-plan-admin#calculate-on-track-status) • This process will run for all students. • This process will calculate any graduation or academic plan a student is assigned. This includes CTE Concentrator Status for those assigned to a CTE Program. 🔔 *This process is taxing on the system, and it is recommended to be run after regular business hours.*	☐
Verify Post Grad Plans *Menu > Student Information > General > Graduation* • Graduation (North Carolina) | Infinite Campus (https://kb.infinitecampus.com/help/graduation-north-carolina#GraduationTab-SouthDakota-GraduationDetail) ℹ️ *If using the Course Plan in Student/Parent Portal this field can be populated via the portal but should be reviewed by staff.*	☐

Task	☑ Completed
Verify Grade 9 Entry Date *Menu > Student Information > General > Graduation* - This field is populated based on the 9th grade enrollment record for the student. - If a date is not entered, review the student's enrollment history to determine the correct grade 9 enrollment. Enter the date of the students first grade 9 enrollment. - NGA Cohort End Year - This field is populated based on the 9th grade enrollment record for the student. - NCLB Cohort End Year - This field is populated based on the 9th grade enrollment record for the student.	☐
Add Seals (Endorsements) *Menu > Student Information > General > Graduation* - Graduation (North Carolina) | Infinite Campus (https://kb.infinitecampus.com/help/graduation-north-carolina#GraduationTab-SouthDakota-GraduationEndorsement) - Requirements for Endorsements can be found: High School Diploma Endorsements | NC DPI (https://www.dpi.nc.gov/districts-schools/high-school-graduation-requirements/high-school-diploma-endorsements) ℹ️ *At this time, this process is manual.*	☐
Review Transcripts - Verify graduation requirements are met - Verify programs are reflected correctly on the transcript (CTE) - Verify seals are reflected correctly on the transcript	☐
Post Diplomas & End Enrollments Using Course Plan Administration *Menu > Student Information > Program Administration > Course Plan Administration* - Course Plan Administration | Infinite Campus (https://kb.infinitecampus.com/help/course-plan-admin#CoursePlanAdmin-PostDiplomas) - If a student is on-track for the graduation program and in grade 12, this process will add a diploma type, diploma date, and diploma period if the fields are blank. - This process can also add an end date and end status to the current enrollment. - The End Date should be **the student's last day of instruction**. - The students' end status should be **W6: High School Graduate**. - The students' diploma period should be **R: Regular**.	

Task	☑ Completed

General Graduation Information —

GRAD Score: 132 ⓘ

Diploma Date: 5/23/2025 📅

Diploma Type: FRC: Future Ready Core ▼

Diploma Period: R: Regular ▼

Date First Entered the 9th Grade: ⓘ 07/01/2021 📅

NGA Cohort End Year: 2025 ▼ Converted data

NCLB Cohort End Year: 2025
Enter NCLB Cohort End Year above.

Post Grad Plans: 4U: Public In-State 4-year ▼

Student Post Grad Confirmation: 📅 ⓘ
Indicates the most recent student acknowledgement of their Post Graduation Plans.

☐

🔔 **Any student that is graduating but not in grade 12 or in grade 12 but is not on track, will need to be processed using Enrollment End Batch Wizard or individually.**

Post Diplomas & End Enrollments Using Enrollment End Batch Wizard
Menu > Student Information > General Student Administration > Enrollment End Batch Wizard

- Enrollment End Batch | Infinite Campus (https://kb.infinitecampus.com/help/enrollment-end-batch)

- The End Date should be the **student's last day of instruction**

- The students' local end status should be **W6: High School Graduate.**

- The Diploma Date should be the **student's last day of instruction**.

- The student's diploma type should be **FRC: Future Ready Core** or **GWC: Graduated with Certificate**.

- The students' diploma period should be **R: Regular.**

ⓘ *This process will add a diploma type, diploma date, and diploma period as well as add an end date and end status for the current enrollment. **Use an Ad Hoc of Graduates for this process**.*

Print Final Transcript	
Menu > Grading & Standards > Reports > Transcript Batch Report	☐
• Transcripts (North Carolina) | Infinite Campus (https://kb.infinitecampus.com/help/transcripts-north-carolina)	

Retentions at End of Year

Students that will be retained at the end of the school year will need to have their end status and end date updated prior to processing all other students' end enrollment. This process can be done by updating each individual student's current enrollment

local end status and end date or can be done by creating Retention ad hoc filter. The sections below provide a guide on creating a Retention Filter and updating the local end status and end date using the filter.

Retention Filter | End Retention Enrollments | Update Retention End Status | Update Future Enrollment | Validate Retentions

Create Retention Filter

Create a Retention ad hoc filter to use to complete the end enrollment process with the correct end status for retained students. This can be completed by creating a multi select ad hoc or a selection editor ad hoc.

Use the Infinite Campus Multi-Select (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/multi-select) article as a guide for how to create a multi select ad hoc filter for retained students.

The Selection Editor ad hoc filter will allow users to select the students from a list.

Any updates to retentions will need to be manually updated in either filter.

End Retention Enrollments

Students that will be retained must have their enrollments ended prior to the full end enrollment process. Follow the steps below to end retained student's enrollments for the current year.

> ℹ️ Before ending current year enrollments, ensure student enrollments have been rolled forward.

> 🔔 Make sure the school context is the current year.

Navigation: Student Information > General Student Administration > Enrollment End Batch Wizard

1. Select the **calendar(s)**
2. Select the **grade levels** that are included in the Retention filter.
3. Select the **Retention** Ad Hoc created earlier.
4. Enter the **last instructional day** of the current school year as the end date.
5. Select **RT: Retained** as the local end status.
   a. Note: If a specific retention reason code is typically used for all students to document retention information, choose the appropriate retention end status for this step.
6. Click **Run** to end the current year enrollments for Retained students.

Each student in the filter should now have an end date and end status for the current year enrollment. If a student's retained end status is different than RT: Retained, use the steps below to navigate to the student's enrollment tool to update the end status to the appropriate Retention Reason.

Update End Status (if applicable)

After using a default end status code, use the steps below to update an individual student's end status if necessary. For example, if RT: Retained was used as the end status, however the reason for the retention is RACD: Retention-Local-Stds-Acad, then navigate to the individual student's enrollment and update the end status.

Navigation: Student Information > General > Enrollments

- Search for the Retained filter by selecting the **Advanced** button in the student search.
- Select **Filter** to see the list of available filters. Select the **Retention** filter created earlier.
- Click **Search** to select the students in the retained filter.
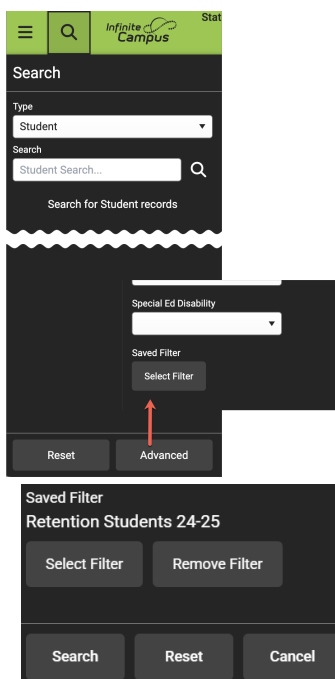
- Select a **student** and click on the **current year enrollment**.
- Update the **local end status** to the retained reason end status.
- Add an **end comment**. (optional)
- Click **Save** to update the current year enrollment.

Update Future Enrollment

Students' future enrollments have been created, but the grade level may not be correct. If the student's future year enrollment is in the same calendar, then follow the steps below to update the student's grade level. If the student's future year enrollment is not in a calendar with your tool rights, contact the next school or SIS Coordinator to work on the process to update the future enrollment record with the correct grade level.

Location of Future Enrollment	Action	Calendar Rights Needed	Tool Rights Needed
Current School	Change grade level in the enrollment record in the future year	Future year of current school	Enrollments - Write
Different School	Delete enrollment record in the future year	Future year of different school	Enrollments - Delete
	Create new enrollment record in the future year	Future year of current school	Enrollments - Add

Navigation: Student Information > General > Enrollments

- Search for the Retained filter by selecting the **Advanced** button in the student search.

- Select **Filter** to see the list of available filters. Select the **Retention** filter created earlier.

- Click **Search** to select the students in the retained filter.

- Select a **student** and click on the **future year enrollment** record

- Select the correct **grade level** from the grade dropdown.

- Add a **start comment** (optional)

- Click **Save** to update the grade level.

Validate End Status for Retained Students

Use the Enrollment Summary Details Report | Infinite Campus (https://kb.infinitecampus.com/help/enrollment-summary-details-report) to review student's end status and end dates. Use the same Retention ad hoc filter to review just the students that were retained. This report can be generated in a CSV format to be opened in a spreadsheet view to filter as needed.

End Enrollments for EOY

Last Instructional Day

Scheduling & Courses > Calendar Setup > Day Setup

- The last day of school should be the actual last day that students were in the building and receiving instruction.

- The instruction checkbox should be marked for the last day.

- This date should also match the end date in the last term for the current year.

- If this date has changed, make sure that School Months have been updated for PMR.

End Enrollments

Student Information > General Student Administration > Enrollment End Batch Wizard

> ⚠️ *Prior to ending enrollments for the current school year, ensure to roll enrollments forward into the future school year using the* **Enrollment Roll Forward Wizard** (https://kb.infinitecampus.com/help/enrollment-roll-forward)**.**

- Make sure to **end graduating students' enrollments** prior to ending all student enrollments (if applicable). See the Graduation Checklist (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/graduation-checklist) for more information.

- Make sure to **end retention students' enrollments** prior to ending all student enrollments.

- Run the Enrollment End Batch Wizard (https://kb.infinitecampus.com/help/enrollment-end-batch) process to end enrollments for all students. Students with existing end dates and end statuses will not be changed when running this process.

- The End Date should be the **last instructional day** of the calendar.

- Select the **PR: Promoted** as the local end status.

- ECS students who return for another year in grade 12, should have an end date of the **last instructional day** of the calendar, and an **PR: Promoted** local end status. Follow the steps to Adding an XG Flag (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/adding-xg-flag) article to add an XG flag. The student should have a future

enrollment in grade 12.

End Enrollments in Program Schools

Student Information > General Student Administration > Enrollment End Batch Wizard

> ⚠️ **Prior to ending enrollments for the current school year, ensure to roll enrollments forward into the future school year using the Enrollment Roll Forward Wizard (https://kb.infinitecampus.com/help/enrollment-roll-forward).**

- Run the Enrollment End Batch Wizard (https://kb.infinitecampus.com/help/enrollment-end-batch) process to end enrollments for all students. Students with existing end dates and end statuses will not be changed when running this process.
- The End Date should be **06/30/20YY**.
- Select the **PR: Promoted** as the local end status.

Enrollment Cleanup Wizard (https://kb.infinitecampus.com/help/enrollment-cleanup-wizard)

Student Information > General Student Administration > Enrollment Cleanup Wizard

- The **Delete** Enrollments calendar selection should be the **current** year calendar.
- The **Update** Enrollments calendar selection should be the **future** year calendar. The student filter should include students whose future year enrollment should be updated.
- Run the Delete Enrollments selection **weekly** to ensure future enrollments for withdrawn students are deleted in the future year.

> 🔔 **Make sure the calendar context is the future year.**

End Program Assignments for EOY

End Program Assignments

Student Information > General Student Administration > Federal/State Program Update Wizard

- Federal/State Program Updater | Infinite Campus (https://kb.infinitecampus.com/help/statefederal-program-updater)

- The Homeless and Read to Achieve programs should be ended as of 06/30/20YY.

Programs can be ended in mass using the Federal/State Program Update Wizard:

- Create an Ad Hoc filter to select all students with an open program
- Use the **Edit Participation** option under Ad Hoc Filter
- Check the box under **Include Field** for **End Date**, with a value of 06/30/20YY
- The **Start Date** and **End Date** should include the entire year from 7/1/20YY to 6/30/20YY
- Overwrite Existing Data should NOT be checked for this purpose
- Click **Test** first to verify that the changes will be what is intended
- Click **Edit Records** to actually run the wizard and change records

Federal/State Program Update Wizard ☆

Federal/State Program Updater

The Federal/State Program Updater allows federal or state program participation data to be added or edited using an import file. Federal or state program participation data records can also be added, edited, or deleted using an Ad hoc filter. For programs that allow an Owner to be specified, edit, delete, and overlapping record logic will be limited to records owned by this District or State Edition.

Select Federal Program:
[Homeless ▾]

Select Mode:

Import File:
- ○ Add/Edit Participation

Ad Hoc Filter:
- ○ Add Participation
- ○ Delete Participation
- ◉ Edit Participation

[Next]

Federal/State Program Update Wizard ☆   Stude

Homeless Program Updater

Select an Ad Hoc Filter to edit records for the selected students.

*Ad Hoc Filter
| Homeless Students | ✕ | ▾ |

Select the fields to be edited and set the new values for the selected fields

Field Name	Include Field	Set Value
Start Date	☐	[____] 🗓
End Date	☑	06/30/2025 🗓
Comments	☐	[____]
Primary Night Time Residence	☐	[_____ ▾]
Served with McKinney-Vento Funds	☐	[__ ▾]
Unaccompanied Youth	☐	[__ ▾]
Services provided other LEA funds	☐	[__ ▾]

Only records that have a Start Date that is on or in the date range selected will be updated. Select Overwrite Existing Data if existing data should be overwritten.

*Start Date   *End Date
| 07/01/2024 🗓 | 06/30/2025 🗓 |

☐ Overwrite Existing Data

Run Test or Run Tool

[Test]

[Edit Records]   or   [Batch Queue - Edit Records]

Reporting and Billing

End of Year Fees (if applicable)

- Report and bill for end of year fees.
- Follow PSU guidelines for this process.
- Fee Billing Batch Report | Infinite Campus (https://kb.infinitecampus.com/help/fee-billing-batch-report)

State Reports

- Month 9 PMR (the PMR is due 10 days after the last day of school)
  - NC Principal's Monthly Report Extract | Infinite Campus (https://kb.infinitecampus.com/help/nc-principals-monthly-report-extract)
  - Tip: Generate the PMR Summary the day after the last day of the school month to collect information for the month.

- ALP - more information to come

- Discipline - more information to come

- CTE Extract (https://kb.infinitecampus.com/help/nc-cte-extract)

- Graduation Data Verification (GDV) (https://kb.infinitecampus.com/help/nc-graduation-data-verification) - Review for accuracy, report is due August 11

Local PSU final reports (Recommended)

Follow your PSUs guidelines for PSU specific end of year reports. Provided below are some reports available in NCSIS that may be used.

- Final Report Cards/Grades
    - Report Card | Infinite Campus (https://kb.infinitecampus.com/help/report-card)
    - Grades Report (Grading and Standards) | Infinite Campus (https://kb.infinitecampus.com/help/grades-report-grading-and-standards)
- Final Class Rank
    - Class Rank Report | Infinite Campus (https://kb.infinitecampus.com/help/class-rank-report)
- Final Transcripts
    - Transcript Batch Report | Infinite Campus (https://kb.infinitecampus.com/help/transcript-batch-report)
- Attendance
    - Period Detail Batch | Infinite Campus (https://kb.infinitecampus.com/help/period-detail-batch)
- Enrollment
    - Enrollment Summary Details Report | Infinite Campus (https://kb.infinitecampus.com/help/enrollment-summary-details-report)

Pause Automated Tasks

- Pause any task scheduler automated tasks until the new year.
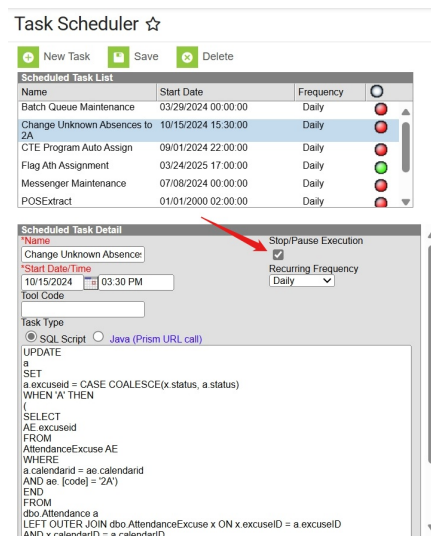
- For automated Data Extract Utility jobs, add a check to the Stop checkbox until the new year.
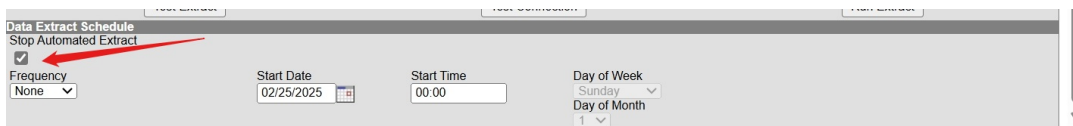
- Update any "Pull" data extract jobs to be SMB as the Pull method will be deprecated starting the summer of 2025.

Administrative EOY

Staff Records

Census > Staff > District Employment/District Assignments

- Add an **end date** to staff District Employment (https://kb.infinitecampus.com/help/district-employment) record for staff who have left the PSU.

- Add an **end date** to staff District Assignment (https://kb.infinitecampus.com/help/district-assignments) for staff who have left the school.

- End access to Campus for staff leaving the school and/or PSU.

- Add/update district assignments for staff that are moving schools.

- Follow your PSU procedures for adding any new staff in NCSIS.

Access Management

Disable User Accounts

User Management > User Account Administration > User Account Batch Wizard

- Disable access to Campus for staff, students, and/or parents during the summer months (if applicable).

- This can be performed with the User Account Batch Wizard | Infinite Campus (https://kb.infinitecampus.com/help/user-account-batch-wizard#UserAccountBatchWizard-DisableUserAccountsforAllSelectedStudentsorStaff).

Update Portal Access

- Portal access can remain available for parents, however, be mindful that options set in the template selected are accessible to parents and students.

- A new Portal template can be created so parents and students can see only what the PSU desires. (i.e. annual updates in OLR, no schedules, previous year information)

- Portal Display Options | Infinite Campus (https://kb.infinitecampus.com/help/portal-display-options)

Record Retention

Grading & Standards > Reports > Cumulative Labels

- Print cumulative labels for student files (if applicable).

- The Cumulative Labels Report (https://kb.infinitecampus.com/help/cumulative-labels-report) only prints student transcript information that also includes credits.

- More information on what is required in a cumulative record can be found here: Local Public School Units | NC Archives (https://archives.ncdcr.gov/government/local-government-agencies/local-public-school-units)

Locker Assignments (if applicable)

- End locker assignments for the current school year using the Locker Batch End Wizard (https://kb.infinitecampus.com/help/locker-batch-end-wizard).

Scheduling for Future Year

Use the information below as a workflow for scheduling in the upcoming year.

Part 1

Task	Completed
NC Course Codes ○ Available in December - 2025-2026 Course Code Master List | NC DPI (https://www.dpi.nc.gov/2025-2026-course-code-master-list) ○ Update current course master information (departments, max students, etc.). This is done by SIS Coordinators, outside of any particular calendar. ○ Once changes are made, wait until the next year calendar is created. Once the calendar is created and the courses have been copied, the course master updates can be pushed to the next year calendar. Do not push to the current calendar.	☐
Assign/Update District Assignments ○ Create future year District Assignments for teachers that are moving schools (*Census > Staff > District Assignments*) ○ District Assignments | Infinite Campus (https://kb.infinitecampus.com/help/district-assignments) ○ Assign teachers to Departments (*Census > Staff > District Assignments*) ○ Make sure the department is added to the correct school and assignment	☐
Create School Year (*Scheduling & Courses > Calendar Setup > School Year Setup*) ○ Scheduling Prep: Calendar Setup For Upcoming Year - Study Guide | Infinite Campus (https://kb.infinitecampus.com/help/scheduling-prep-calendar-setup-for-upcoming-year-study-guide#define-the-next-school-year) ○ Label - XX-XX ○ Start Date 7/1/XXXX; End Date 6/30/XXXX	☐

Task	Completed

Create New Calendars (*Scheduling & Courses > Calendar Setup > Calendar Wizard*)
 	
 ○ Determine which calendar option to choose - Scheduling Prep: Calendar Setup For Upcoming Year - Study Guide | Infinite Campus (https://kb.infinitecampus.com/help/scheduling-prep-calendar-setup-for-upcoming-year-study-guide#determining-what-calendar-option-to-choose)
 	
 ○ Create New Blank Calendars - only for new schools - Scheduling Prep: Calendar Setup For Upcoming Year - Study Guide | Infinite Campus (https://kb.infinitecampus.com/help/scheduling-prep-calendar-setup-for-upcoming-year-study-guide#create-new-blank-calendars)
 	
 ○ Create New Calendars by Roll Forward Calendars with selected data - Scheduling Prep: Calendar Setup For Upcoming Year - Study Guide | Infinite Campus (https://kb.infinitecampus.com/help/scheduling-prep-calendar-setup-for-upcoming-year-study-guide#determining-what-calendar-option-to-choose)
 	
   ○ Choose *Year Schoolname* template
 	
   ○ Start Date **7/1/XXXX**; End Date **6/30/XXXX**
 	
   ○ Select: Calendar Attributes, Schedule Structures, Term Schedules, Period Schedules, Section Templates, Portal calendar and term settings, Grade Levels, Courses
	☐

Delete special period schedules (*Scheduling & Courses > Calendar Setup > Period Setup*) **Make sure the calendar context is the future year.*	☐
Delete any courses in the future year calendar that will not be used (*Scheduling & Courses > Courses > Course Information*) ○ Check the NC Course Code Master List for disabled courses to delete ○ Use the Disabled Course Codes (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/disabled-course-codes) article for more information on filters to find existing disabled courses. **Make sure the calendar context is the future year.*	☐
Add Term Dates (*Scheduling & Courses > Calendar Setup > Term Setup*) ○ Calendar Terms | Infinite Campus (https://kb.infinitecampus.com/help/terms) **Make sure the calendar context is the future year.*	☐
Day Setup (*Scheduling & Courses > Calendar Setup > Day Setup*) ○ Day Reset - Day Setup | Infinite Campus (https://kb.infinitecampus.com/help/day-setup#Days-DayReset) establishes the instructional days (first instructional day to last instructional day) ○ Day Rotations Day Setup | Infinite Campus (https://kb.infinitecampus.com/help/day-setup#Days-DayRotations) establishes the rotation of the period schedules (single day schedules will not show rotations) **Make sure the calendar context is future year.*	☐

Task	Completed

School Months (*Scheduling & Courses > Calendar Setup > School Months*)
 	
• Add School Months dates - School Months (North Carolina) | Infinite Campus
  (https://kb.infinitecampus.com/help/school-months-north-carolina)
    ○ *School Months can be added at a later time, but before the beginning of the new school year.
 	
Make sure the calendar context is future year.
	☐

Roll Forward the rest of the Calendar to Copy (*Scheduling & Courses > Calendar Setup > Calendar Wizard*) ○ Calendar Wizard | Infinite Campus (https://kb.infinitecampus.com/help/calendar-wizard-a#pick-the-data-to-copy) - Choose Copy Data into Existing Calendar ○ Copy/Append - will not overwrite information in new calendar ○ Select the remaining data to copy: Sections with Schedule Placement, Teacher Assignments, Room Assignments, Grading Tasks, Credits, Standards, Grade Calc Options, Categories, Course Rules, Schedule Building Constraints, Course Fees, Attendance Excuse Codes, Scheduling Teams, Section Team Assignments, Calendar Overrides, GPA Calculations.	☐

Roll Forward Student Enrollment (*Student Information > General Student Administration > Enrollment Roll Forward Wizard*)
 	
○ Enrollment Roll Forward Wizard | Infinite Campus (https://kb.infinitecampus.com/help/enrollment-roll-forward)
    ○ Do not choose 12th Grade
    ○ Do not choose 5th or 8th grades (transition students can be completed separately to select the destination calendar)
    ○ Select **E1: Init enroll - this year** as the Local Start Status
    ○ Select **Primary** as the Source Service Type
    ○ Select **Main** as the Source Structure
    ○ General Roll Forward Logic - Enrollment Roll Forward Wizard | Infinite Campus (https://kb.infinitecampus.com/help/enrollment-roll-forward#enrollment-roll-forward-logic)
 	
○ Assign Graduation Programs to use academic planning options - Graduation Program Assignment | NC Department of Public Instruction (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/graduation-program-assignment)
	☐

Assign/Update Tool/Calendar Rights (*User Management > User Groups > Calendar/Tool Rights*)
 	
○ Scheduling Tool Rights (https://kb.infinitecampus.com/help/tool-rights-scheduling)
 	
○ Calendar Rights (+1 year)
    ○ Add the future year to the + calendar user group
    ○ Remove any previous years in the + calendar user group
	☐

Part 2

Task	Completed

Update Course Information (in the future year calendar only) (*Scheduling & Courses > Courses > Add Course*)
 	
• Follow the NCDPI Course Code Master List (https://www.dpi.nc.gov/2025-2026-course-code-master-list)
 	
• Mark courses no longer being used as inactive or delete them from the new school year calendar as needed at the school level
   ○ ***Be sure to be in the future school year when deleting courses.***
 	
• Add new courses that will be offered for the year from the course master selection
 	
• Update course scheduling fields (Any changes made to the course masters during prep, can be pushed to the courses and course sections in the future calendar.)
   ○ Attach Departments to Course Masters or Courses
   ○ *Check the number terms, schedules and periods of the Course
   ○ Determine if the course can be requested by students in the Portal via Course Master level or Course level (Allow student requests)
   ○ Determine if the course can be requested by teachers via Course Master level or Course level (Allow teacher requests/recommendations)
   ○ *Select the desired scheduling priority (if applicable)
   ○ Determine if the course can be repeated (Repeatable) - Admin can select a course to retake without this checked, but students cannot select a course again, if this is unchecked.
 	
*Note: Some course information can be viewed/updated using the Course Planner Tool (https://kb.infinitecampus.com/help/course-planner-course-planner).
*Make sure the calendar context is future year.
	☐

Establish Course Rules (http://kb.infinitecampus.com/help/course-rules) (*Scheduling & Courses > Courses > Course Rules*) • Scheduling Rules (used with building and loading) - Course Rules | Infinite Campus (https://kb.infinitecampus.com/help/course-rules#scheduling-rules) • Planning Rules (used with course plans) - Course Rules | Infinite Campus (https://kb.infinitecampus.com/help/course-rules#planning-rules) **Make sure the calendar context is future year.*	☐
Establish Student Constraints (*Scheduling & Courses >Build Schedules > Student Constraints Setup*) • Student Constraints | Infinite Campus (https://kb.infinitecampus.com/help/student-constraints) • Set strict or not strict constraints between students **Make sure the calendar context is future year.*	☐

Part 3

Task	Completed
Add Course Requests Choose which option to use to add course requests. More than one of the options below can be used to enter course requests. However, if using course plan, the planned courses must be created into course requests before using the other course request tools. *Make sure the calendar context is future year.*	☐
Course Plan (*Student Information > Academic Planning > Course Plan*) The following should be completed in order when using planned courses for course requests ● All students must have a Graduation Program to use the course plan. Follow the instructions in the Graduation Program Assignment (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/graduation-program-assignment) article for assigning programs. (*Student Information > Academic Planning > Programs*) 　○ Run the Academic Plan Status Report	Infinite Campus (https://kb.infinitecampus.com/help/academic-plan-status-report) to show students without an active program. (*Student Information > Program Administration > Academic Plan Status Report*) ● Portal Display Options enabled for academic plan for students to add planned courses (*System Settings > Portal Preferences > Portal Display Options*) 　○ Portal Display Options	Infinite Campus (https://kb.infinitecampus.com/help/portal-display-options) ● Teacher Recommendations (if using) 　○ Student Course Recommendations (Instruction)	Infinite Campus (https://kb.infinitecampus.com/help/student-course-recommendations-instruction) ● Student or Admin add planned courses to the course plan. (*Student Information > Academic Planning > Course Plan*) 　○ Course Plan (Academic Planning)	Infinite Campus (https://kb.infinitecampus.com/help/course-plan-academic-planning) ● Lock Course Plans once courses have been updated. (*Student Information > Program Administration > Course Plan Administration*) 　○ Course Plan Administration	Infinite Campus (https://kb.infinitecampus.com/help/course-plan-admin) ● Run reports to review course plans prior to creating requests from the planned courses 　○ Calculate On-Track Status with the updated course plans. (*Student Information > Program Administration > Course Plan Administration*) 　　■ Course Plan Administration	Infinite Campus (https://kb.infinitecampus.com/help/course-plan-admin#calculate-on-track-status) 　　■ This process is taxing on the system and should be run after normal operating hours. 　○ Run the Academic Plan Status Report	Infinite Campus (https://kb.infinitecampus.com/help/academic-plan-status-report) to see if the updated planned courses meet the requirements for the graduation program. (*Student Information > Program Administration > Academic Plan Status Report*)	☐

Task	Completed

○ Academic Plan Progress Batch | Infinite Campus (https://kb.infinitecampus.com/help/academic-plan-progress-batch) can be used to see individual student academic plans. (*Student Information > Program Administration > Academic Plan Progress Batch Report*)
 	
    ○ Course Plan Batch | Infinite Campus (https://kb.infinitecampus.com/help/course-plan-batch) can be used to see several students' academic plans in one report. (*Student Information Program Administration > Course Plan Batch Report*)
 	
• Create course requests from planned courses (*Student Information > Program Administration > Course Plan Administration*)
 	
    ○ Course Plan Administration | Infinite Campus (https://kb.infinitecampus.com/help/course-plan-admin#CoursePlanAdmin-CreateCourseRequests)
 	
Make sure the calendar context is future year.	

Requests & Rosters (*Scheduling & Courses > Scheduling > Requests & Rosters*) • Requests and Rosters | Infinite Campus (https://kb.infinitecampus.com/help/requests-and-rosters) • Use this tool to add requests to students in mass. • *Reminder: Check the "Include Inactive Students" checkbox to work with students in the future year. *Make sure the calendar context is future year.*	☐
Walk-in Scheduler (*Student Information > General > Schedule*) • Walk-In Scheduler | Infinite Campus (https://kb.infinitecampus.com/help/walk-in-scheduler#Walk-InScheduler-AddRequests) • Add requests to individual students *Make sure the calendar context is future year.*	☐
Course Registration (*Student Portal > More > Course Registration*) • Course Registration (Campus Student) | Infinite Campus (https://kb.infinitecampus.com/help/course-registration-campus-student) • Tool must be enabled in Portal Display Options. • Any course that has allow student requests checked will be displayed for the student to choose. • Requests are added as Elected or Alternate. • Students cannot remove any Required requests. *Make sure the portal display option is enabled for the future year.*	☐

Task	Completed

Run Reports
Check course requests by using the reports below. Other reports may be used as well.
 	
• Schedule Units Report (*Scheduling & Courses > Reports > Schedule Units Report*)
    ○ Schedule Units Report | Infinite Campus (https://kb.infinitecampus.com/help/schedule-units-report)
    ○ Use this report to find under requested students
 	
• Requests Satisfied Report (*Scheduling & Courses > Reports > Requests Satisfied Report*)
    ○ Requests Satisfied | Infinite Campus (https://kb.infinitecampus.com/help/requests-satisfied)
    ○ Use this report to see how many requests there are per course
 	
• Request Conflicts Report (*Scheduling & Courses > Reports > Request Conflict Report*)
    ○ Request Conflicts Report | Infinite Campus (https://kb.infinitecampus.com/help/request-conflicts)
    ○ Use this report to see a list of possible conflicts with requests
 	
• Request Batch Report (*Scheduling & Courses > Reports > Request Batch Report*)
    ○ Request Batch Report | Infinite Campus (https://kb.infinitecampus.com/help/request-batch)
    ○ This will print requests by students as one page per student
 	
*Make sure the calendar context is future year.
	☐

Part 4

Task	Completed

Scheduling Board (*Scheduling & Courses > Scheduling > Scheduling Board*)
• Copy trials to maintain previous schedules
    ○ Scheduling Board Trials | Infinite Campus (https://kb.infinitecampus.com/help/scheduling-board-trials-new)
 	
• Set Scheduling Board Options
    ○ Scheduling Board | Infinite Campus (https://kb.infinitecampus.com/help/scheduling-board-new#settings)
 	
• Set Scheduling Board build settings (max periods, max courses)
    ○ Scheduling Board | Infinite Campus (https://kb.infinitecampus.com/help/scheduling-board-new#build-settings-side-panel)
 	
*Make sure the calendar context is future year.
	☐

Task	Completed

Staff Planner (*Scheduling & Courses > Scheduling > Staff Planner*)
Use this tool to update individual teachers or in mass. Updating these settings will allow the system to automatically assign teachers to sections with the correct constraints.
 	
   • Staff Planner | Infinite Campus (https://kb.infinitecampus.com/help/staff-planner-staff-planner)
   • Add teacher course assignments
   • Assign rooms to teachers
   • Assign teams to teachers
   • Add Teacher constraints
   • Update individual teachers' max periods, max courses, etc. if different from the default
 	
*Make sure the calendar context is future year.
	☐

Course Planner (*Scheduling & Courses > Scheduling > Course Planner*)
Use this tool to update individual courses or in mass.
 	
   • Course Planner | Infinite Campus (https://kb.infinitecampus.com/help/course-planner-course-planner)
   • Set sections to build, max students, load priority
   • Set number of sections to build per teacher
   • Set Placement restrictions
   • Set Scheduling Rules
 	
*Make sure the calendar context is future year.
	☐

Task	Completed

Build the Schedule (*Scheduling & Courses > Scheduling > Scheduling Board*)
 Use this tool to create trials and build or adjust a schedule. To maximize efficiency, it's recommended to complete all setup preparations, including course planner updates, staff planner updates, and course requests if you're building.
 	
 • Scheduling Board | Infinite Campus (https://kb.infinitecampus.com/help/scheduling-board-new#build)
 • Use the build settings to set build defaults
 • Build by Department, Course or run a Full build.
 • Use the board view settings for highlights to see possible issues.
 • Unbuild by department, course or full unbuild to restart the build process.
 • Lock departments, courses, or sections to keep those in place.
 • Drag and drop to move sections.
 • Make changes as needed in staff and course planner.
 • Run reports to check the build.
     ○ Master Schedule Report (Scheduling & Courses > Reports > Master Schedule Report)
     ○ Teacher Schedule Batch Report (Scheduling & Courses > Reports > Teacher Schedule Batch Report)
     ○ Room Usage Report (Scheduling & Courses > Reports > Room Usage Report)
 	
 Make sure the calendar context is future year.
	☐

Load Students (*Scheduling & Courses > Scheduling > Scheduling Board*) Course requests must be added to student's records before using the load tool. • Scheduling Board | Infinite Campus (https://kb.infinitecampus.com/help/scheduling-board-new#load-all-courses) • Set Load Settings - Scheduling Board | Infinite Campus (https://kb.infinitecampus.com/help/scheduling-board-new#load-settings-side-panel) • After the schedule has been built, load by department, course, or run a full load. • Unload by department, course or run a full unload. • Lock rosters by department, course, section, or grade level to keep students in the section. *Make sure the calendar context is future year.*	☐

Task	Completed

Run Reports (*Scheduling & Courses > Reports*)
Use the reports below to see the load results for students' requests.
 	
• Schedule Units Report | Infinite Campus (https://kb.infinitecampus.com/help/schedule-units-report)
  ° Use this report to find under requested students.
 	
• Requests Satisfied | Infinite Campus (https://kb.infinitecampus.com/help/requests-satisfied)
  ° Use this report to see how many requests there are per course.
 	
• Request Conflicts Report | Infinite Campus (https://kb.infinitecampus.com/help/request-conflicts)
  ° Use this report to see a list of possible conflicts with requests.
 	
• Request Batch Report | Infinite Campus (https://kb.infinitecampus.com/help/request-batch)
  ° This will print requests by students as one page per student.
 	
Make sure the calendar context is future year.
	☐

Other Helpful Reports (*Scheduling & Courses > Reports*)
• Staff History Report | Infinite Campus (https://kb.infinitecampus.com/help/staff-history-report)
  ° Determine if any sections are without a primary teacher.
 	
• Seat Count Report | Infinite Campus (https://kb.infinitecampus.com/help/seat-count)
  ° See the number of students per period.
 	
• Section Roster Report | Infinite Campus (https://kb.infinitecampus.com/help/section-roster-report)
  ° See rosters for teachers as needed.
 	
• Schedule Batch Report | Infinite Campus (https://kb.infinitecampus.com/help/schedule-batch-report)
  ° See individual student schedules.
 	
• Teacher Schedule Batch Report | Infinite Campus (https://kb.infinitecampus.com/help/teacher-schedule-batch-report)
  ° See individual teacher schedules.
 	
Make sure the calendar context is future year.
	☐

Lock Scheduling Board (*Scheduling & Courses > Scheduling > Scheduling Board*) • The active trial is the visible schedule. • Lock the final trial. When the future year becomes the active year, the active trial will automatically lock. ° Users with tool rights can unlock the trial, but it will lock back once saved. • Remove tool rights to the scheduling board when scheduling should be adjusted using course/sections and student's schedules.	☐

Task	Completed
Fill Student Gaps Run Reports to identify gaps and/or issues • Student Gap Scheduler (*Scheduling & Courses > Load Schedules > Student Gap Scheduler*) ◦ Student Gap Scheduler	Infinite Campus (https://kb.infinitecampus.com/help/student-gap-scheduler) • Schedule Gap Filler (*Scheduling & Courses > Load Schedules > Schedule Gap Filler*) ◦ Schedule Gap Filler	Infinite Campus (https://kb.infinitecampus.com/help/schedule-gap-filler) • Requests Satisfied Report (*Scheduling & Courses > Reports > Requests Satisfied Report*) ◦ Requests Satisfied Report	Infinite Campus (https://kb.infinitecampus.com/help/requests-satisfied) • Seat Count Report (*Scheduling & Courses > Reports > Student > Seat Count Report*) ◦ Seat Count Report	Infinite Campus (https://kb.infinitecampus.com/help/seat-count) • Manually add alternates using the Walk in Scheduler	☐

Update Active Year

✅ All **Before the Last Day of School** (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/before-last-day-current-year) and **After the Last Day of Current Year** (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/after-last-day-of-current-year) **tasks for the End of Year should be completed before the future year is made active.**

Scheduling & Courses > Calendar Setup > School Year Setup

1. Select the **future** year.

2. Check the **Active** Checkbox.

3. Click **Save** to make the future year active.

School Year Setup ☆

Note: When the active year is updated, the scheduling trial that is active will lock automatically.

DPI will switch the active year to the new future in the State Edition of NCSIS on June 30th.

NCSIS Knowledgebase | Article: After Last Day of Current Year | Last Updated: 06/23/2025 12:41 pm EDT