

# Checklists

04/21/2026 6:42 am EDT

## Future Year Setup Checklist

Use this checklist to confirm all required Future Year Setup tasks are completed prior to April 1.

Task	<input checked="" type="checkbox"/> Completed
<b>School Year Setup</b>	
Create Future School Year <ul style="list-style-type: none"> <li>Verify Start and End dates are 7/1/YYYY to 6/30/YYYY</li> </ul>	<input type="checkbox"/>
<b>Calendar Setup</b>	
Create Future Calendars <ul style="list-style-type: none"> <li>Verify Start and End dates are 7/1/YYYY to 6/30/YYYY</li> </ul>	<input type="checkbox"/>
<b>Course and Structure Review</b>	
Delete disabled courses	<input type="checkbox"/>
Mark unused courses as inactive	<input type="checkbox"/>
Add or remove periods and/or period schedules as needed	<input type="checkbox"/>
<b>Term and Day Setup</b>	
Enter term start and end dates	<input type="checkbox"/>
Complete Day Reset and Day Rotation (if applicable)	<input type="checkbox"/>
Complete all day setup	<input type="checkbox"/>
<b>School Months</b>	
Enter School Months 1-9	<input type="checkbox"/>

Task	<input checked="" type="checkbox"/> Completed
<b>Grade Levels</b>	
Review grade levels and sequences	<input type="checkbox"/>
<b>Program Calendars</b>	
Create Program Calendars	<input type="checkbox"/>
Complete Day Setup	<input type="checkbox"/>
<b>Optional (if applicable)</b>	
Update Online Registration (OLR)	<input type="checkbox"/>
Verify portal access settings	<input type="checkbox"/>

## End of Year Closeout Checklist

Use this checklist to confirm all End of Year processes are completed after the last instructional day and before updating the active year.

Task	<input checked="" type="checkbox"/> Completed
<b>Final Grading</b>	
Verify all grades are posted and correct.	<input type="checkbox"/>
<b>Transcripts and Academic Records</b>	
Post Transcript grades	<input type="checkbox"/>
Complete grade suppressions (if applicable)	<input type="checkbox"/>
Verify class rank (if applicable)	<input type="checkbox"/>
Generate final transcripts	<input type="checkbox"/>
<b>Graduation Process (if applicable)</b>	
Verify graduation programs	<input type="checkbox"/>
Update CTE status (if applicable)	<input type="checkbox"/>
Calculate on-track status	<input type="checkbox"/>
Verify post-grad plans	<input type="checkbox"/>

Task	<input checked="" type="checkbox"/> Completed
Add seals	<input type="checkbox"/>
<b>Enrollments</b>	
Confirm Future Enrollments are complete	<input type="checkbox"/>
End Graduate enrollments	<input type="checkbox"/>
End Retention enrollments	<input type="checkbox"/>
End Promotion enrollments	<input type="checkbox"/>
End Program enrollments	<input type="checkbox"/>
Validate enrollment end statuses	<input type="checkbox"/>
<b>State Programs</b>	
End Federal/State programs	<input type="checkbox"/>
<b>State Reporting</b>	
Complete all State Reports	<input type="checkbox"/>
<b>Local Reporting</b>	
Generate and save reports for local use	<input type="checkbox"/>
<b>Administrative Tasks</b>	
Audit final data	<input type="checkbox"/>
End of Year fees (if applicable)	<input type="checkbox"/>
Pause automated tasks	<input type="checkbox"/>
Update staff assignments	<input type="checkbox"/>
Disable user accounts (if applicable)	<input type="checkbox"/>
Review portal settings	<input type="checkbox"/>
Complete record retention tasks	<input type="checkbox"/>
Locker Assignments (if applicable)	<input type="checkbox"/>
Roll Forward Reports	<input type="checkbox"/>
<b>Final Validation</b>	

Task	<input checked="" type="checkbox"/> Completed
Verify reports and data accuracy	<input type="checkbox"/>
Confirm all required process are complete	<input type="checkbox"/>
<b>Activate New Year</b>	
Confirm all prior steps are complete	<input type="checkbox"/>
Update Active Year by July 1	<input type="checkbox"/>

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