

Checklists

05/04/2026 3:15 pm 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
School Year Setup	
Create Future School Year <ul style="list-style-type: none"> • Verify Start and End dates are 7/1/YYYY to 6/30/YYYY 	<input type="checkbox"/>
Calendar Setup	
Create Future Calendars <ul style="list-style-type: none"> • Verify Start and End dates are 7/1/YYYY to 6/30/YYYY 	<input type="checkbox"/>
Course and Structure Review	
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"/>
Term and Day Setup	
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"/>
School Months	

Task	<input checked="" type="checkbox"/> Completed
Enter School Months 1-9	<input type="checkbox"/>
Grade Levels	
Review grade levels and sequences	<input type="checkbox"/>
Program Calendars	
Create Program Calendars	<input type="checkbox"/>
Complete Day Setup	<input type="checkbox"/>
Summer School Calendars	
Create Summer School Calendars	<input type="checkbox"/>
Optional (if applicable)	
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
Final Grading	
Verify all grades are posted and correct.	<input type="checkbox"/>
Transcripts and Academic Records	
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"/>
Graduation Process (if applicable)	
Verify graduation programs	<input type="checkbox"/>

Task	<input checked="" type="checkbox"/> Completed
Update CTE status (if applicable)	<input type="checkbox"/>
Calculate on-track status	<input type="checkbox"/>
Verify post-grad plans	<input type="checkbox"/>
Add seals	<input type="checkbox"/>
Enrollments	
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"/>
State Programs	
End Federal/State programs	<input type="checkbox"/>
State Reporting	
Complete all State Reports	<input type="checkbox"/>
Local Reporting	
Generate and save reports for local use	<input type="checkbox"/>
Administrative Tasks	
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"/>

Task	<input checked="" type="checkbox"/> Completed
Locker Assignments (if applicable)	<input type="checkbox"/>
Roll Forward Reports	<input type="checkbox"/>
Final Validation	
Verify reports and data accuracy	<input type="checkbox"/>
Confirm all required process are complete	<input type="checkbox"/>
Activate New Year	
Confirm all prior steps are complete	<input type="checkbox"/>
Update Active Year by July 1	<input type="checkbox"/>

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