

EOY Checklist

05/30/2025 9:03 am EDT

EOY Checklist

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



If Part 1 of the [Scheduling Workflow](https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/scheduling-workflow-building) (<https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/scheduling-workflow-building>) has been completed, refer to the 'Before the Last Day of School' section as a double check.

Before the Last Day of School

Task	<input checked="" type="checkbox"/> Completed
School Year and Calendar	
Create the future School Year. (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/create-future-school-year)	<input type="checkbox"/>
Create the future year school calendar(s) (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/rolling-forward-program-calendars#SchoolCalendars)	<input type="checkbox"/>
Create the future year program calendars (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/rolling-forward-program-calendars#ProgramCalendars)	<input type="checkbox"/>
Checks and Updates (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/checks-and-updates) *Make sure the calendar context is the future year!	
Grade Levels (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/checks-and-updates#GradeLevelCheck)	<input type="checkbox"/>
Term Setup (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/checks-and-updates#TermSetupCheck)	<input type="checkbox"/>
Period Setup (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/checks-and-updates#PeriodSetupCheck)	<input type="checkbox"/>
Day Setup (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/checks-and-updates#DaySetupCheck)	<input type="checkbox"/>

Task	<input checked="" type="checkbox"/> Completed
School Months (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/checks-and-updates#SchoolMonthsCheck)	<input type="checkbox"/>
Future Enrollments (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/future-enrollments)	
School Calendar Student Enrollment Roll Forward (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/future-enrollments#StudentRollForward)	<input type="checkbox"/>
Program Calendars Student Enrollment Roll Forward (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/future-enrollments#ProgramRollForward)	<input type="checkbox"/>
Enrollment Cleanup Wizard (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/future-enrollments#EnrollmentCleanup) <i>*Make sure the calendar context is the future year! Run weekly!</i>	<input type="checkbox"/>
Pre-Register Students (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/future-enrollments#Pre-registerStudents) <i>*Make sure the calendar context is the future year!</i>	<input type="checkbox"/>
Additional (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/additional-items)	
EDDIE Updates (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/additional-items#EDDIEUpdates) (if applicable)	<input type="checkbox"/>
Online Registration Updates (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/additional-items#OLRUpdate) (if applicable)	<input type="checkbox"/>

After the Last Day of School

Task	<input checked="" type="checkbox"/> Completed
Final Grading (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/final-grading)	
Post Grades (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/final-grading#PostGradesEOY)	<input type="checkbox"/>
Final Report Cards (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/final-grading#FinalReportCards)	<input type="checkbox"/>
Post Transcript Grades (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/final-grading#PostTranscriptEOY)	<input type="checkbox"/>
Grade Suppression (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/final-grading#GradeSuppressionEOY) (if applicable)	<input type="checkbox"/>
Class Rank (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/final-grading#ClassRankEOY) (if applicable)	<input type="checkbox"/>
Final Transcripts (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/final-transcripts) (if applicable)	<input type="checkbox"/>

Task	<input checked="" type="checkbox"/> Completed
Graduates (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/graduates-eoy) (if applicable)	
Graduation Checklist (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/graduates-eoy) (if applicable)	<input type="checkbox"/>
Retentions (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/retentions-eoy)	
Create Retention Filter (use for ending enrollments)	<input type="checkbox"/>
End Retention Enrollments (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/retentions-eoy#endretentionenrollment)	<input type="checkbox"/>
Enrollment Processes (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/end-enrollments-for-eoy)	
Last Instructional Day Check (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/end-enrollments-for-eoy#LastInstructionalDay)	<input type="checkbox"/>
End Enrollments (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/end-enrollments-for-eoy#EndEnrollmentsEOY) *Roll forward all enrollments before ending current year enrollments	<input type="checkbox"/>
End Program Assignments (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/end-program-assignments-for-eoy)	<input type="checkbox"/>
Enrollment Cleanup (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/end-enrollments-for-eoy#EnrollmentCleanup) *Make sure the calendar context is the future year! Run weekly!	<input type="checkbox"/>
Reporting and Billing (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/reporting-and-billing)	
End of Year Fees (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/reporting-and-billing#EOYFees) (if applicable)	<input type="checkbox"/>
State Reports (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/reporting-and-billing#EOYStateReports)	<input type="checkbox"/>
Local PSU final reports (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/reporting-and-billing#EOYPSUReports)	<input type="checkbox"/>
Pause Automated Tasks (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/reporting-and-billing#EOYTasksPause)	<input type="checkbox"/>
Administrative (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/administrative-eoy)	
Staff Records (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/administrative-eoy#StaffEOY)	<input type="checkbox"/>
Access Management (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/administrative-eoy#UserManagementEOY)	<input type="checkbox"/>

Task	<input checked="" type="checkbox"/> Completed
Record Retention (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/administrative-eoy#RecordRetentionEOY)	<input type="checkbox"/>
Locker Assignments (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/administrative-eoy#LockerEOY) (if applicable)	<input type="checkbox"/>
Scheduling (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/scheduling-for-future-year)	
Scheduling Board (if applicable)	<input type="checkbox"/>
Future Year Schedule Active and Locked	<input type="checkbox"/>
Update Active Year (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/update-active-year)	
DPI will switch the active year to the new future on June 30th.	<input type="checkbox"/>

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