

End of Year Processes

ESBOCES

2025- 2026

Check list and Summary

Infinite Campus End of Year Checklist

Grades/Transcripts

1. **Post** final term's **Report Card Scores**.
2. **Ensure** teachers have posted all grades for all terms and tasks (**Missing Grades Report**).
3. **Run Auto Grade** and/or print a grade verification report – make appropriate grade changes and /or add it.
4. **Print Report Cards** for mailings and record keeping.
5. **Import Regents (RCTs)** and/or other Assessments to the Assessments Tab (**Assessment Center> Assessment Data Mapping and Importing**).
6. **Post** appropriate grades to **Transcripts**, review **Transcript** template(s) for proper Regents/RCT display (***Student Information > General Student Administration > Transcript Post Wizard***).
7. **Print Transcripts** for mailings and record keeping.
8. **Run State End of Year and District Reports**.

Student Information – Enrollments

8. **Verify** enrollments for the next school year have been added/modified. Perform 2nd student roll forward before ending enrollments using the (***Student Information > General Student Administration > Enrollment End Batch Wizard***) . **Enrollments should only be ended after enrollments have been rolled forward into the next calendar.**
9. **Graduate 12th graders** – enter **Graduation Tab** information manually or through the **Enrollment End Batch Wizard**. Diploma - **Date**, Type - **Local/Regents/with Honors/CTE etc**, Period - **EA, SP, SU**, Post Grad Location- **IS, OS**, and Plans – **Unknown, Military, Employment, Other Career Path Art, Hum, Lote, etc...**
10. **Run Graduation Cohort Validation Report** afterward
11. **Verify Enrollment start date** is correct for the next school year. Enrollments should start **7/1/yyyy**² for NYS

Infinite Campus End of Year Checklist (cont)

Student Information – Enrollments

12. **Review State-Reporting** specific entries for rolled over student data (Grade – Location – BEDS code overrides, exclude checks, etc.)
13. **Verify** that retained students are in the correct grade level and are scheduled accordingly.
14. **Verify** students are enrolled in class sections for the next school year. ([Scheduling & Courses > Load Schedules > Student Gap Scheduler](#))

System Administration

15. **Verify** the last instruction day is indeed the last day of School in the Days tab. [Scheduling & Courses > Calendar Setup > Calendar Information](#) dates should read **07/01/xx – 06/30/xx.**
16. **Verify** the first day of instruction in next year's calendar is the first day of school.
17. **Verify** term dates and period times are correct in the next year's calendar.
18. **Review** user tool rights for access to calendars and appropriate tools.
19. **End access** to Infinite Campus for those individuals who've left the district (non-returning staff, graduated students-portal, etc).
20. **Change** the **Active Year** to the next school year ([Scheduling & Courses> Calendar Setup > School Year Setup](#))
21. **Update Calendar Group Rights** for the new school year.

Agenda

- **Complete Score Entry** and prep for **Transcript Post**.
 - *Verification Reports and Auto Grade*
- **Import Regents (RCT) & other test to the Assessments Tab and Post to Transcript**
- **Batch** prints and **SIRS** Extracts
- **Retention**; remaining calendar and student roll
- **Student closeout**
 - *Lockers, Transportation, Counselors*
- **End Seniors** and **Post Grad** tab info
- **End/update** *useraccounts* and *tool rights*
- **Roll** forward *reports* and *calendar rights groups*
- **Review** *portal display preferences* and **change active school year**

Complete Score Entry

- Verify the final term's scores are posted for all schools/tasks.
 - Run a Missing Grades Report: [Grading & Standards > Reports > Grades Report](#). (Report will be easier to address if run per-calendar.)
 - Select All Students.
 - Select last term*.
 - Select All Teachers.
 - Select Sort Preferences. (Group By)
 - Select last term's grading task(s) - run a report for all tasks or individually.
 - Select "Missing Grades / Scores" and select whether or not to show dropped.
 - Generate the report.
 - Address issues administratively (by counselor, by teacher, etc.) and designate a date for completion.
 - Consider performing Ad Hoc filters to verify score/percentage consistency, but make sure it's after all posts are completed and windows are closed (no teacher access for updates).

*If necessary, run the same report for the other terms before addressing the Final Term's tasks, as other scores will affect the final task posted (if using composite grading). Once scores are complete (not null), an effective ad hoc filter can be run to verify the related "percent" field isn't null.

Missing Grades Report

[Grading Standards](#) > [Reports](#) > [Grades Report](#)

Grades Batch Report

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

Which students would you like to include in the report?

☒ Grade ☐ Ad Hoc Filter

Grading Terms

☐ QTR1 ☐ QTR2 ☐ QTR3 ☒ QTR4

Select Teachers

Banks, Christine
Becchina, Brian
Beck, Robert
Coleman, Lisa
Damico, Nicole
Dudek, Vanessa
Dyro, Luisa

Group By

☒ Student ☐ Teacher ☐ Course/Section

☒ Display term dates
☒ Display section dates
☐ Set page break for each Student

Select Standard/Grading Tasks

Quarter
Progress
Midterm
Final Exam
Final Grade
Regents
RCT

☐ All Grades / Scores
☒ Missing Grades / Scores

Show Dropped Students ☒

Complete Score Entry

- If your district has **Composite Grading** and is using **Auto Grade** (instead of allowing a manual final grade post,) run the **Auto Grade** tool.

[Grading & Standards](#) > [Grading & Standards Administration](#) > [Auto Grade Wizard](#)

- Select a Grading Task (only those with an associated Composite Grade configuration will display for selection). The Score Group associated with the selected will determine which courses are being posted (based on the course's Grading Tasks tab designation).
- Select a Score Group. The score group doesn't have to match the score group selected above. Since cross-group posting is possible, make sure the group selected complies with your district's grading policy.
- Select whether or not to Overwrite Existing Grades. If selected, all current entries will be replaced with the composite calculation (based on the percent field value entered for each task/term). If not selected, Auto Grade will only complete the selected tasks' entries for NULL scores.
- When all selections have been verified, click Auto Grade Students, and wait for the confirmation popup.

Auto Grade Wizard ☆ [Grading & Standards](#) > [Grading & Standards Administration](#) > Auto Grade Wizard

Auto Grading Wizard

This tool allows you to batch grade students based on Composite Grading. All scores should be posted for the child grading tasks. Also, each posted score for the child grading tasks should have an appropriate percentage.

Note: Auto Grade uses grading setup that exists on the course. Use the [Course Awaiting Push Report](#) to verify if there are any unpushed grading setup changes. Posted grades will not include unreleased assignments.

Select Grading Task

Select Score Group
Make sure the Min Percentages are set properly for the Score Group you choose.

Existing Grades
☐ Overwrite Existing Grades

Complete Score Entry

- After the grading window is closed, consider running a grades verification report (for review by counselors, teachers, etc.) before posting to transcript and reporting Final Grade Outcome to NYS.
 - Run an “all grades” report: [Grading & Standards > Reports > Grades Report](#).
(Report will be easier to address if run per-calendar.)
 - Select All Students.
 - Select the last term.
 - Select All Teachers.
 - Select Sort Preferences. (Group By)
 - Select last term’s final grading task (task that will be posted to transcript).
 - Select “All Grades / Scores” and select whether or not to show dropped.
 - Generate the report.
 - Changes or updates should be performed administratively (without opening the grading window again).

Grades Verification Report

Grades Batch Report

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

Which students would you like to include in the report?

☒ Grade

All Students
07
08
09
10

☐ Ad Hoc Filter

Grading Terms ☐ QTR1 ☐ QTR2 ☐ QTR3 ☒ QTR4

Select Teachers

All
Banks, Christine
Becchina, Brian
Beck, Robert
Coleman, Lisa
Damico, Nicole
Dudek, Vanessa
Dyro, Luisa

Group By ☒ Student ☐ Teacher ☐ Course/Section

☒ Display term dates

☒ Display section dates

☐ Set page break for each Student

Select Standard/Grading Tasks

All
Quarter
Progress
Midterm
Final Exam
Final Grade
Regents
RCT

☒ All Grades / Scores

☐ Missing Grades / Scores

9

Import Assessments

- Use the **Assessment Center – Data Mapping and Importing tool** to upload all state-reported assessments (and others, if desired/available). Verify that all scores are posted properly by creating an ad hoc filter or by spot-checking individual students.
 - Verify that all required fields are loaded for each test type, and the standard achieved/alt standard achieved codes match for the test title.
 - Verify scores are displaying/not displaying on transcripts as desired.

Post to Transcripts

- **Post** scores to **transcripts** once it has been verified that all scores are entered correctly.

Grading & Standards > Score Group & Rubric Setup > [select score group]

Verify the score groups' "Credit Coeff." fields are set properly. This is a multiplier for a graduation credit value on the course, so a passing score should receive a multiplier/coefficient of "1" ($n \times 1 = n$) and a failing score should receive a multiplier/coefficient of "0" ($n \times 0 = 0$). This is not related to the earned GPA value in any way. Also verify the Class Detail Outcome Code for each score.

- Class Detail Outcome Code is used for the Student Class Grade Detail SIRS extract, and will not affect transcript posts in any way, but you're already verifying data in this same table.

Post to Transcripts

- **Post** scores to **transcripts** once it has been verified that all scores are entered correctly.

System Administration > General Student Administration > Transcript Post Wizard

- Select a sort and the calendar(s) to post.
- Select the credit types to be posted (Select Credit Groups). Don't select only the group name, make sure each individual type to be posted is highlighted.
- Select the term(s) to post. (In most cases Term 2 posts will have already been completed for January grads.)
- **Uncheck "Post Score Comments to Transcript" so comments will not be posted.**
- Select to post by student grade level(s), a specific student-based ad hoc filter, or course/section(s).
- After all selections are verified, click **Run**. **Do not click Run a second time.** **This process will take a few minutes as it is very data-intensive. You will receive a popup confirmation notice with the number of scores that have been posted.**
 - **Mistakenly posted scores must be removed or edited manually. There isn't an "unpost-" or "overwrite-" transcript function available. Transcript post follows the Campus "bucket" logic, once a "bucket" (transcript course score) is full, nothing new can be added to it. However, newly added scores can be posted (tool can be run repeatedly) to fill empty/null "buckets".**

Post to Transcript

Transcript Post Wizard ☆

[Student Information](#) > [General Student Administration](#) > [Transcript Post Wizard](#)

Post Grades to Transcripts

The Transcript Post tool takes scores from the Grade Book and posts them to the student's transcript. Scores from Grading Tasks or Standards marked as Post to Transcript and associated with a Credit or Standard group will post. There are three posting options:

- **Post Courses, Scores, & Credits by Term:** used to post scores and credits for any grading task or standard associated with a term or terms.
- **Post One-Time Grading Task or Standard:** used to post scores and credits for one-time tasks/standards that are scored once and are not associated with a term.
- **Post Courses and Scores Only for All Terms:** used to post scores only (no credits) for any task or standard.

This tool can be used multiple times without duplicating records, which prevents a score changed by a teacher in their gradebook from affecting a posted transcript record. After the Transcript Post process is complete, any necessary changes to scores need to be manually updated on the student's transcript. Credit information can be added to the records created using the first option and selecting the applicable terms and credit groups.

Select Calendars

Which calendar(s) would you like to include in the report?

- ☒ active year
☐ list by school
☐ list by year

25-26
25-26 Angela Test HS
25-26 Christine Coaches
25-26 Christine Test HS
25-26 Jackie HS Clubs
25-26 Jackie Test ES
25-26 JACKIE TEST HS
25-26 Jackie Test HS Summer Sc
25-26 Jackie Test MS
25-26 JoAnn Test ES
25-26 JoAnn Test HS
25-26 JoAnn Test MS
25-26 Rich Test HS

CTRL-click or SHIFT-click to select multiple

Select Credit Groups

- Christine Test ES Grade 3 CC Sci Standards-Science
-(1-1) ENGLISH LANGUAGE ARTS
-READING
-WRITING
-LISTENING & SPEAKING SKILLS
-(1-1) Language Arts First Grade
-(1-2) Language Arts Second Grade
-(1-3) Language Arts Third Grade
-(1-4) Language Arts Fourth Grade
-(1-5) Language Arts Fifth Grade
-(1-K) Language Arts Kindergarten
-(2-1) Mathematics First Grade
-(2-2) ENGLISH LANGUAGE ARTS
-READING FOUNDATIONAL SKILLS
-LITERATURE & INFORMATIONAL TEXT

CTRL-click or SHIFT-click to select multiple

Post Courses, Scores, & Credits by Term

All Terms
Term 1
Term 2
Term 3
Term 4

CTRL-click or SHIFT-click to select multiple

- ☐ Post One-Time Grading Task/Standard
☐ Post Courses and Scores Only for All Terms

☒ Post Score Comments to Transcript

Select Grades

All grades
00
01
02
03

CTRL-click or SHIFT-click to select multiple

Ad Hoc Filter

☐ Select an Ad Hoc Filter

Select Course/Section Sort by

Number Name
100-1 Earth and Space Science
1001-1 Act
101-1 Life Science: Biology
102-1 Chemistry
103-1 Physics
200-1 Global History & Geography 1
201-1 Global History & Geography 2
202-1 US History & Govt
300-1 Algebra 1

CTRL-click or SHIFT-click to select multiple

RUN

Run the Transcript Audit Report

- Run the **Transcript Audit Report** after all transcript posts are complete. This identifies score mismatches between the grade book and transcript tab, and can locate posted comments that may have inadvertently been entered.

- [Grading & Standards > Reports > Transcript Audit Report](#)

The screenshot shows the 'Transcript Audit Report' interface. At the top, there is an orange header bar with the text '25-26 JACKIE TEST HS' and icons for notifications (2), help, and user profile. Below the header, the page title 'Transcript Audit Report ☆' is displayed on the left, and a breadcrumb trail 'Grading & Standards > Reports > Transcript Audit Report' is on the right. A blue bar contains the title 'Transcript Auditing Report'. Below this, a grey box contains the text: 'This report will compare the transcript data with the source Grading data and lists the differences in score and comments.' The main area has the heading 'Which fields do you want to be audited?' with two checked checkboxes: 'grade' and 'comments'. Below these is a 'Report Format:' label and a dropdown menu set to 'PDF'. At the bottom left is a 'Generate Report' button.

Run Batch Prints

- **Run** batches of **Report Cards, Transcripts**, and any other desired end of year reports for distribution, and as a good practice, keep an electronic copy of these reports for a “snapshot in time” of the data.
 - Campus previous years’ data can be altered by anyone with tool rights to prior years, so keeping the record of each file will reflect what was recorded and reported at this point in time, helping identify and track any modifications that may be made in the future.

[Grading & Standards > Reports > \[Canned or Custom of each report type\]](#)

Run SIRS Extracts

- Run the following extracts for end-of year **Level 0/Data Warehouse** loading:

- *Reporting > NY State Reporting > SIRS Extracts*

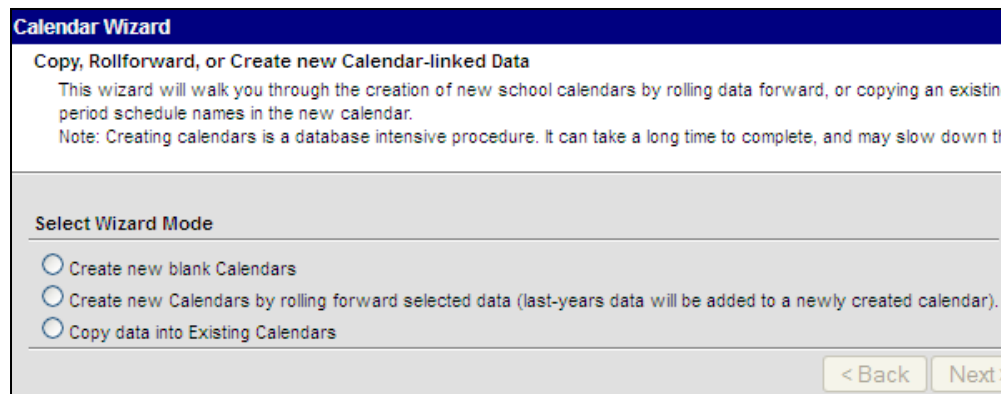
- Assessment AccMod Fact
- Assessment Fact
- Assessment Code
- Course
- Course Instructor Assignment
- Day Calendar
- Location Marking Period Code
- Partner Project Fact
- Programs Fact
- School Entry Exit
- Student Behavioral Intervention
- Student Class Entry Exit
- Student Class Grades Detail
- Student Daily Attendance
- Student Digital Access
- Student Lite
- These reports are listed in the order they appear in the Campus dropdown, and not in the load sequence for Level 0. The date selections and extract options chosen for these reports will vary dependent upon your district's preferences and the load date. Please contact the Infinite Campus Help helpdesk team at infinitecampushelp@esboces.org for report generation assistance, or for loading instruction and assistance.
- Please contact the Data Warehouse helpdesk team at dwtshelp@esboces.org.

Roll Remaining Calendars

- In many districts, secondary calendars are rolled early for master schedule preparation, and primary, elementary, and intermediate school calendars are rolled at the end of the school year.
 - The **Calendar Wizard** allows a user to quickly create new calendars from previous calendars (rolling forward).
 - Partial calendar-element rolls are possible, and information can be copied from an existing calendar into another.

Scheduling & Courses > Calendar Setup > Calendar Wizard

- Click the second button, “Create new Calendars by rolling forward selected data...” under Select Wizard Mode.



The screenshot shows the 'Calendar Wizard' window. At the top, it says 'Calendar Wizard' in a blue header. Below that, the title is 'Copy, Rollforward, or Create new Calendar-linked Data'. The main text explains that the wizard will walk through creating new school calendars by rolling data forward or copying existing period schedule names. A note mentions that creating calendars is a database-intensive procedure that can take a long time. Below this is a section titled 'Select Wizard Mode' with three radio button options: 'Create new blank Calendars', 'Create new Calendars by rolling forward selected data (last-years data will be added to a newly created calendar).', and 'Copy data into Existing Calendars'. The second option is selected. At the bottom right, there are '< Back' and 'Next >' buttons.

Calendar Roll Options and Completion Notification

Calendar Wizard

Copy, Rollforward, or Create new Calendar-linked Data
This wizard will walk you through the creation of new school calendars by rolling data forward. o
Note: Creating calendars is a database intensive procedure. It can take a long time to complete.

Pick the Data to Copy

☐ Calendar Attributes

☐ Schedule Structures

☐ Term Schedules
(NOTE: Term dates will not roll if they fall outside of the calendar start and end dates.)

☐ Period Schedules

☐ Days

☐ Day Events

☐ Section Templates

☐ Portal Calendar and Term Settings

☐ Grade Levels

☐ Courses

☐ Sections w/ Schedule Placement

☐ Teacher Assignments

☐ Section Staff Assignments

☐ Room Assignments

☐ Grading Tasks, Credits, Standards 

☐ Grade Calc Options

☐ Categories

☐ Course Rules

☐ Schedule Building Constraints

☐ Course Fees

☐ Assessments

☐ Cross-Site Course/Section Settings 

☐ Attendance Excuse Codes☐ Scheduling Teams

☐ Section Team Assignments

☐ Calendar Overrides☐ GPA Calculations

Run Wizard

< Back

Next >

Calendar Wizard

Copy, Rollforward, or Create new Calendar-linked Data
This wizard will walk you through the creation of new school cal
Note: Creating calendars is a database intensive procedure. It c

Progress

Running Wizard...
Building 25-26 Jackie Test HS
1 Schedule Structures copied.
0 Missing Assignments Preferences copied.
1 new Trials created.
0 Trial User View Settings copied.
1 Term Schedules copied.
4 Terms copied.
2 Period Schedules copied.
18 Periods copied.
0 Section Template Groups copied.
0 Section Templates copied.
0 Section Template Placements copied.
1 Portal Display Options Template Assignments copied.
1 Portal Calendar and Term Settings copied.
4 Grade Levels copied.
0 Scheduling Groups copied.
26 Attendance Excuse Codes copied.
0 Behavior Referral Schedules copied.
...

260 Section Placements copied.
37 Teaching Section Assignments copied.
Course Fees copied.
0 Staff Section Assignments copied.
0 Scheduling Rules and 0 Planning Rules copied.
0 Build Constraints - Course Placement - copied.
0 Build Constraints - Course Room - copied.
0 Build Constraints - Course Teacher - copied.
0 Build Constraints - Room Placement - copied.
0 Build Constraints - Teacher Placement - copied.
0 Build Constraints - Teacher Room - copied.
36 Grading Tasks, Standards, and Credits copied.
452 Grade Calc Option entries copied.
105 Categories copied.
0 Calendar Overrides copied.
0 Assessments copied.
0 GPA Calculations copied.

Complete

Clean Your New Calendar's Data Elements

- When the new calendar is accessed, check all fields for accuracy.
 - Pay specific attention to the Sequence numbers assigned to Grade Levels in the grades tab. The sequence is what drives the grade level roll of your students in the steps following the calendar roll.

26-27 JACKIE TEST HS

Scheduling & Courses > Calendar Setup > Calendar Information

Calendar Information ☆

Save Mark for Deletion

Calendar Info

Calendar ID 356 Parent Calendar ID 333 School 785 JACKIE TEST HS (schoolID:19)

*Name 26-27 JACKIE TEST HS Number Sequence

*Start Date 07/01/2026 *End Date 06/30/2027 Summer School

Student Day (instructional minutes) 380 Teacher Day (minutes) 480 Exclude

Whole Day Absence (minutes) 320 Half Day Absence (minutes) 130 School Choice

Type I: Instructional

Require Student Assignment

Ignore Master Push

Comments rolling 12/05/2025 01:50 PM

Verification of Roll

26-27 JACKIE TEST HS

Scheduling & Courses > Calendar Setup > Grade Level Setup

Grade Level Setup ☆

New Save Delete

Grade Level Editor	
Name	Seq
09	10
10	11
11	12
12	13

Grade Level Detail

Name (locked) 09

*Sequence Number 10

*State Grade Level Code 09: 9th grade

Clean Your New Calendar's Data Elements

- Change your term dates to dates that occur within the new school year.
 - Estimated dates are OK. These do not have to be exact until the first day of instruction.
- Alter your period times, schedules (rotation), and instructional preferences if necessary.

26-27 JACKIE TEST HS

Scheduling & Courses > Calendar Setup > Term Setup

Term Setup ☆

Save Term Schedule/Terms New Term Schedule/Terms Delete Term Schedule/Terms

Term Schedule/Terms Editor

Name

Quarters

Term Schedule Detail

*Name Primary

Quarters ☒

*Name	*Sequence	*Start Date	*End Date	Term Code
X Q1	1	09/02/2026	11/15/2026	
X Q2	2	11/16/2026	01/23/2027	
X Q3	3	01/24/2027	04/10/2027	
X Q4	4	04/11/2027	06/25/2027	

Add Term

26-27 JACKIE TEST HS

Scheduling & Courses > Calendar Setup > Period Setup

Period Setup ☆

Save Period Schedules New Period Schedule Delete Period Sched/Periods Copy Period Sched/Periods

Period Schedule/Periods Editor

Name

A

B

Period Schedule Placement

	A	B
1	1	1
2	2	2
3	3	3
4	4	4
5	5	5
6	6	6
7	7	7
8	8	8
Act	Act	Act

Period Schedule Info

*Name *Sequence Exception/Special Instructional Minutes School Day

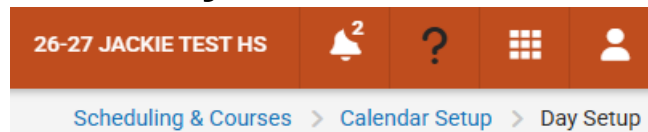
A 1 0 391 423

Period Info

*Name	*Sequence	Start Time	End Time	Lunch Time	Non-Instructional	Responsive
X 1	1	07:10 AM	07:54 AM	0	☐	☐
X 2	2	07:58 AM	08:46 AM	0	☐	☐
X 3	3	08:50 AM	09:34 AM	0	☐	☐

Clean Your New Calendar's Data Elements

- Change the detail of a single day:
 - Days (tab)> Click on a date.
 - In Day Detail, alter the School/Instruction/Attendance check boxes as needed, and click Add Day Event.
 - Select the proper Day Event Code for state reporting.
- Change the detail of multiple days:
 - Days (tab)> Click “Multi Day Event”.
 - Fill the dates, remembering that a Campus “day” runs from 12 a.m. to 11:59 p.m.
 - Add the day Event Type
 - Alter the School/Instruction/Attendance check boxes as needed.
- Save as needed, and verify that days are set properly by running the Day Calendar extract for the new school year.



Day Setup ☆

Day Reset Day Rotation Print Print Rotation Multi Day Event

<< November 2026

Sun	Mon	Tue	Wed	Thu
01	02 A	03 A	04 A	05
08	09 A	10 A	11	12 A

Day Detail

Date: 11/11/2026 Day #: Not an instructional day.

*Period Schedule: A

School Day: ☐ Instruction: ☐ Attendance: ☐

Start Time: End Time: Duration: 0

Comments: Veteran's Day

Multi Day Event Wizard

This tool will create a multi-day event.
Warning: This will overwrite any Instruction, Attendance, or School Day choices previously selected.

*First Day of Event:

*Last Day of Event:

*Type: CH: Holiday - Christmas

Duration: Inst. Minutes:

☐ Instruction ☐ Attendance ☐ School Day

Save Multi Day Event

Day Events

Type: X OH: Holiday - Other

Duration: Inst. Minutes:

Add DayEvent

Use the Copier to Sync Similar Calendars

- Once you have a single calendar set, you can copy the updated data to calendars with matching schedule and period structures (i.e. multiple elementary schools using the same day/period rotations, or secondary schools on the same rotation).
 - **Scheduling & Courses > Calendar Setup > Calendar Wizard** - Copy data into Existing Calendars
 - Click Overwrite Terms/Days to “sync” like calendars, Next, select the recently updated calendar as the “source” and click all similar calendars for destination. Click Next, and select Term Schedules, Days (any other previously un-copied data will be “selectable” at this time also) and Run Wizard.

Calendar Wizard

Copy, Rollforward, or Create new Calendar-linked Data

This wizard will walk you through the creation of new school calendars by rolling data forward, or copying an existing calendar period schedule names in the new calendar.

Note: Creating calendars is a database intensive procedure. It can take a long time to complete, and may slow down the system.

Select Copy Mode

☒ Overwrite Terms/Days - Useful for updating term/day changes to calendars that already have days. Will update Term dates, Day flags (instruction, attendance, schoolDay) and will sync up A/B days if the calendars use the same names for Period Schedules.

☐ Copy/Append other data elements

< Back Next >

Calendar Wizard ☆

Calendar Wizard

Copy, Rollforward, or Create new Calendar-linked Data

This wizard will walk you through the creation of new school calendars by rolling data forward, or copying an existing calendar period schedule names in the new calendar.

Note: Creating calendars is a database intensive procedure. It can take a long time to complete, and may slow down the system.

Source Calendar

25-26 Christine Test HS
25-26 Jackie HS Clubs
25-26 Jackie Test ES
25-26 Jackie Test ES
25-26 JACKIE TEST HS
25-26 Jackie Test HS Summer Sc
25-26 Jackie Test MS
25-26 JoAnn Test ES
25-26 JoAnn Test HS
25-26 JoAnn Test MS
25-26 JoAnn Test MS
25-26 JoAnn Test MS
25-26 JoAnn Test MS
25-26 Rich Test HS
24-25 Angela test ES

Destination Calendars

25-26 Jackie HS Clubs
25-26 Jackie Test ES
25-26 JACKIE TEST HS
25-26 Jackie Test HS Summer Sc
25-26 Jackie Test MS
25-26 JoAnn Test ES
25-26 JoAnn Test HS
25-26 JoAnn Test MS
25-26 Rich Test HS
26-27 Jackie HS Clubs
24-25 Angela Test HS
24-25 Christine Coaches
24-25 Christine ES
24-25 Christine MS
24-25 Christine Test HS
24-25 Jackie Test ES
CTRL-click and SHIFT-click for multiple

< Back Next >

Enrollment Roll Forward

- Perform a student **Enrollment Roll Forward** to move students into the upcoming calendar in the next sequential grade level.
 - Run a *Student Information > Reports > Enrollment Summary Report* for a building where all students are being rolled.
 - This provides a comparative count for each grade level. Active students minus retained students equals the target roll-forward student count.

Student Information > General Student Administration > Enrollment Roll Forward Wizard

- Select a calendar to roll.
- Select which grade levels within that calendar will roll. (Multiple levels can be rolled at once or one grade level at a time depending on user preferences.)
- If desired, select an ad hoc filter (rather than grade levels) to roll a specific group of students from the selected calendar. If rolling multiple grade levels without a destination calendar selected, students changing location will not roll (i.e. MS 8th grade will not roll to HS 9 as part of the sequence setup).
- Select the current student enrollment type(s).
- Select the source structure from the source calendar.
- Select the start status 0011- this is the NYS code for all rolling students.
- Select the destination calendar. If left unselected, students will roll based on grade level sequence within the same building, the student's enrollment tab's "next calendar" entry, or school address boundary. If the student has the opportunity to roll to multiple locations based on this criteria, the student will not roll.
- Select the destination grade level. (Optional - leave blank if rolling multiple grade levels at once.)

Enrollment Roll Forward

Student Information > General Student Administration > Enrollment Roll Forward Wizard

- Select Start Date Override **07/01/20xx** - this is the date required by NYS for all rolling students.
- “Allow Duplicate Primary Enrollments” is a district preference where students can attend in two schools at once. Do not check this unless this is absolutely necessary.
- “Totals Only” check will give a grade-level summary count of students being rolled (rather than name-by-name).
- Show Warnings - Community documentation says warnings will be displayed when this is checked, however, they don’t provide an example. This may apply to state editions of Campus only. Check it in the event there’s a warning that may apply to you. It will not affect the function of the roll.
- Include students whose enrollments end on the last day of the last term. - Check this box if you have ended students before the rollover.
- Run a test first to see if your totals match your expected student count.
 - If the totals are correct on the test, Run the tool.
 - If not, check for reasons your existing students may not roll.
- There is a blue link in the report header describing the logic of this tool, “Show Detailed Instructions.” See arrow on next page.
- Perform a second student roll for those calendars that have been rolled over already.
 - This will pick up any students enrolled between the original rollover date and today.
 - Make sure you don’t have “Allow Duplicate Primary Enrollments” checked on the second roll as a precaution.

Enrollment Roll Forward

25-26 Jackie Test ES

1

?

Enrollment Roll Forward Wizard ☆

Student Information > General Student Administration > Enrollment Roll Forward Wizard

Enrollment Roll Forward

The Enrollment Roll Forward tool assists in the promotion, retention or demotion of currently enrolled students into the next calendar and next grade level.

This tool is safe to run repeatedly. Each student is rolled only once. If a student already has an existing enrollment in the next calendar, that student is not included in the enrollment roll again.

Before using this tool, ensure calendars have been rolled forward using the Calendar Wizard.

NOTE: If you are using School Boundary settings on your households, different logic is used. For more information, [click here](#).

Select Source Calendars

25-26 Christine HS

25-26 Jackie Test ES

25-26 Jackie Test HS

25-26 Jackie Test MS

26-27 Jackie Test HS

24-25 Homebound Daily Attendan

24-25 Jackie Test ES

24-25 Jackie Test HS

24-25 Jackie Test MS

23-24 Angela Elementary School

23-24 Angela High School

23-24 Jackie Test ES

23-24 Jackie Test HS

23-24 Jackie Test MS

23-24 Karen Test HS

CTRL-click and SHIFT-click for multiple

Select Source Grades

☐ 01

☐ 02

☐ 03

☐ 04

☐ 05

☐ 06

☐ 07

☐ 08

☐ 09

☐ 1

☐ 10

☐ 10th

☐ 11

☐ 11th

☐ 12

☐ 12th

☐ 13

☐ 14

☐ 2

☐ 3

☐ 4

☐ 5

☐ 6

☐ 7

☐ 8

☐ 9

☐ 9th

☐ GD

☐ K

☐ K1

☐ K2

☐ K3

☐ K4

☐ K5

☐ K6

☐ PK

☐ PS

☐ Source Ad Hoc Student Filter

Source Service Type

☐ Primary

☐ Partial

☐ Special Ed Services

Select Source Structure

Select Local Start Status

0011: Enrollment in building or grade (Valid 93-94 thru current)

(OPTIONAL)

Select Destination Calendar

Select Destination Grade

Select Destination Structure

Start Date Override

If school days for the next school year have been finalized and Calendar Days have been set, this date does not have to be entered. The first term date of the next school year is automatically selected. If Calendar Days have not been set, enter the Start Date Override as the first instructional day of the next school year.

☐ Allow Duplicate Primary Enrollments

☒ Totals Only

☐ Show Warnings

☐ Include students whose enrollments end on the last day of the last term

RUN TEST

RUN

25

Student Closeout

- End Locker Assignments.
 - If lockers change yearly or if you need to empty lockers from senior assignments and they were not pre end-dated, use the Locker End Batch Wizard to end them all at once.
 - ***School & District Settings > Lockers > Locker Batch End Wizard***
 - This can be run in all calendars with an ad hoc filter, but more detailed information is offered on the screen when selecting a calendar in the header.
 - Select the lockers to be ended, remembering the less checks, the more narrow the search.
 - Including an ad hoc filter will also narrow the search.
 - Add the end date you want to use as the “vacate locker” date.
 - Locker Effective Date refers to the “active” date the student resides in the locker, and will end students based on this date of membership.
 - Your “locker effective date” should reflect the latest date your students have “owned” the locker.
 - Check overwrite existing if desired.
 - Click End Locker Assignments to keep the historical record. Lockers should only be deleted if assigned in error.

Student Closeout

- Roll Forward and/or End Transportation Records. Transportation records are linked to the student's enrollment calendar year.
 - To roll forward, go to **School & District Settings > Transportation > Transportation Roll Forward Wizard**
 - Select the calendar to roll on the left.
 - Select the new calendar transportation assignment (based on student enrollment) on the right.
 - Select the Transportation Effective Date. This is the “active” date of the student transportation record, and will roll students based on this date of membership.
 - Your “transportation effective date” should reflect the latest date your students have “owned” the bus/parking record.
 - Select a start date (optional).
 - Select students by grade or ad hoc filter.
 - Check or uncheck to roll only records for the destination calendar.
 - Run Test for a count of students who will roll. If this number is reasonable, roll the records. If this is unreasonable, check you roll specifications.

End Seniors and Post Grad Tab Information

- Seniors will need their enrollment records ended to indicate a graduation status, and Grad Tab information needs to be filled for proper state reporting.
 - Some districts prefer to accomplish this by having counselors end information per-student, but the Enrollment End Batch tool will allow multiple students to be updated at once. This can also be done via MYAP.
 - Some districts end every student every year with the “EOY” code. This is not required by NY State, but this can also be accomplished with this tool.

End Seniors and Post Grad Tab Information

Student Information > General Student Administration > Enrollment End Batch Wizard (Instruction specific to Seniors.)

- Select the calendars where the grade 12 students will end.
 - Select the grade level 12, and an ad hoc filter if narrowing the student pool further.
 - Select the end date.
 - Select the end status 799: Graduated (earned a Regents or local diploma).
 - Select an end action (if desired).
 - Select a Diploma Date (actual grad date).
 - Select the Diploma Type.
 - Select the Diploma Period.
 - Select the Post Grad Location.
 - Select the Post Grad Plans.
 - Run. A confirmation message will display.
- Only students with null enrollment fields will be updated, so either both sets of information must be updated together, or Grad detail must be loaded first.
- Once a student enrollment end date/status is filled, Grad data only can't be filled using the wizard.
 - Neither Enrollment or Graduation tab data will be overwritten using this tool.
 - Students who are already marked as Retained or Demoted on their Enrollment records will not be updated.

End Access

- End user accounts (add end date or click disable), building district assignments, and employment information for all personnel not returning to the district in the fall.
 - This may already be set in [User Management > Settings > Account Security Preferences](#)
 - “Automatically disable accounts after staff member is no longer employed by the district.”
- End student and parent accounts in accordance with your district’s security policy.
 - Remember ending seniors may want to access report cards and transcripts after graduating.
 - This may already be set in Management> Account Security Preferences
 - “Automatically disable student accounts day(s) after enrollment end date, and portal accounts for parents with no enrolled students [User Management > Settings > Account Security Preferences](#)
 - Note: Disabling account will only apply to students with no future enrollments”

[User Management > User Account Administration > User Account Batch Wizard](#)

- Tools used in this tab apply to whole-calendar only.

Update User Rights

- Change user tool group rights for staff changing roles in the district, as well as their district assignment location(s) if applicable.
 - Change District Assignment location and/or assignment roles.
 - Review all user rights, make sure groups' access is appropriate and includes newly-added tools, and make sure users are in the correct calendar and tool groups for the upcoming year.
 - Search any users who may have been assigned individual rights throughout the year, and remove them/create a new tool group if necessary.

Roll Reports Forward

- *System Settings > System Preferences > Reports Roll Forward Wizard*
 - Reports available for roll will read from the calendar in the header.
 - Select the reports to roll.
 - Select a target calendar. Cross calendar report roll isn't possible.
 - Click Run.
 - Review the “next year” reports templates for accuracy in term, comment, and portal publish reporting.

Good Advice!

- Save these last two steps until you're prepared to have parents, teachers, and students see schedules for the next year.
 - Most districts wait until the first day of teacher in-service or Superintendent's Conference Day at the beginning of the year. Waiting limits requests for schedule changes before the school year has started.

Roll Calendar User Group Rights

- Search > User Groups
 - Open each calendar group (last/this/next) and select the Calendar Rights tab.
User Management > User Groups > Calendar Rights
 - Advance the selected year (by editing the existing record) and building selection for each group.
 - Adding a new record will give users in this group access to both years. Campus recommends calendar groups access only one year at a time.
 - Click Save.

Calendar Rights ☆

User Management > User Groups > Calendar Rights

Related Tools ▼

New Save Delete

Rights Editor

Name
25-26 Jackie Test HS

School Year Rights

School: Jackie Test HS

Year: 26-27

Calendar: 25-27 Jackie Test HS

Modify Rights ☐ Close School Months ☐

Calendar Rights

- Add User Group
- User Group Information
- Calendar Rights**
- Membership Summary
- Tool Rights

Change the Active School Year

- Update the Portal preferences for each school, including portal-displayed reports.
 - *System Settings > System Preferences > Report Setup > [select report] > display in portal checkbox.*
 - *System Settings > Portal Preferences > Portal Display Options*, update as necessary.
- ***Scheduling & Courses > Calendar Setup > School Year Setup***
 - Open the new school year's record, and check the "active" box. There can only be one active year at a time for the entire district, and the Portal display reflects the active year selection.

The new school year is now effective!



Eastern Suffolk BOCES Board and Administration

President

Lisa Israel

Vice President

Robert P. Sweeney

Members

Arlene Barresi
Angelo Cassarino
Linda S. Goldsmith
William Hsiang

Kelli Anne Jennings
Susan Lipman
Joseph LoSchiaivo
Anne Mackesey
James F. McKenna

Brian O. Mealy
Victoria Molloy
Catherine M. Romano
John Wyche

District Superintendent

Jasmin Varela, Ed.D.

Chief Operating Officer

David Wicks

Associate Superintendent

Claudy ~~Damus-Makelele~~ - Educational Services

Associate Superintendent

James J. Stucchio - Management Services

Assistant Superintendent

Nichelle Rivers, Ed.D. - Human Resources

Directors

Leah Arnold - Career, Technical and Adult Education
Kate Davern - Educational Support Services
Arlene Durkalski - Human Resources
Mark Finnerty - Facilities
Katelyn Fretto - Business Services
Gina Reilly - Special Education
Darlene Roces - Regional Information Center
Elaine Romeyk - Administrative Services
Jachan Watkis - Diversity, Equity, and Inclusion

www.esboces.org

Eastern Suffolk BOCES does not discriminate against any employee, student, applicant for employment, or candidate for enrollment on the basis of sex, gender, race, color, religion or creed, age, weight, national origin, marital status, disability, sexual orientation, gender identity or expression, transgender status, military or veteran status, domestic violence victim status, genetic predisposition or carrier status, or any other classification protected by Federal, State, or local law. This policy of nondiscrimination includes: access by students to educational programs, student activities, recruitment, appointment and promotion of employees, salaries, pay, and other benefits. ESBOCES also provides equal access to the Boy Scouts and other designated youth groups. ESBOCES fully complies with all applicable rules and regulations pertaining to civil rights for students and employees (e.g., Title IX of the Education Amendments of 1972, §504 of the Rehabilitation Act of 1973, Titles VI and VII of the Civil Rights Act of 1964, Dignity for All Students Act, §303 of Age Discrimination Act of 1975, the Americans with Disabilities Act of 1990, and the Boy Scouts of American Equal Access Act of 2001). Inquiries regarding the implementation of the above laws should be directed to either of the Eastern Suffolk BOCES Civil Rights Compliance Officers at ComplianceOfficers@esboces.org: the Assistant Superintendent for Human Resources, 631-687-3029, or the Associate Superintendent for Educational Services, 631-687-3056, 201 Sunrise Highway, Patchogue, NY 11772. Inquiries may also be addressed to the Office for Civil Rights at the US Department of Education, 32 Old Slip, 26th Floor, New York, NY 10005, 646-428-3800, OCR.NewYork@ed.gov.