

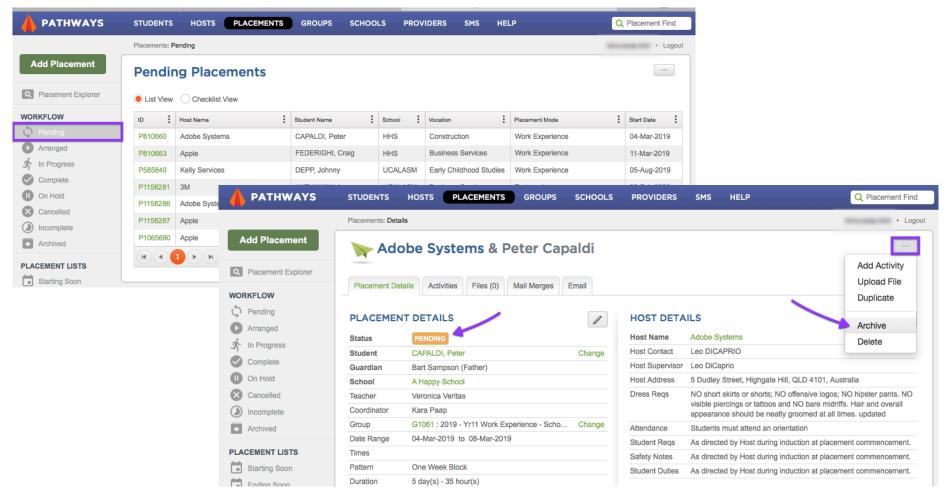
# **EOY - BEST PRACTICE**

Training Template + Notes for Customer Use

#### PLACEMENTS - CLEAN UP PENDING



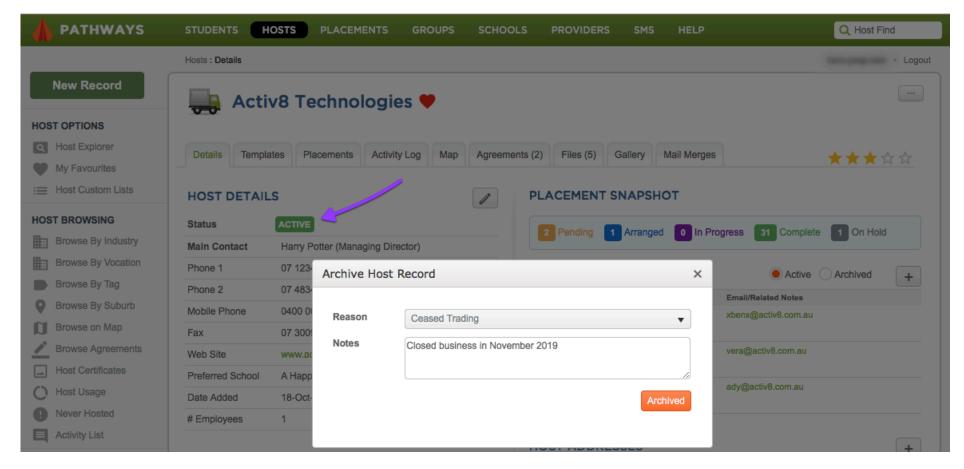
Pending placements are often those that were in the oven, but never quite finished baking. We recommend reviewing anything in the "Pending" status at the end of the year - archive any pending placements that are not needed or related to a future placement so you don't stumble over them next year.



#### **ACTIVE HOSTS CHECK**



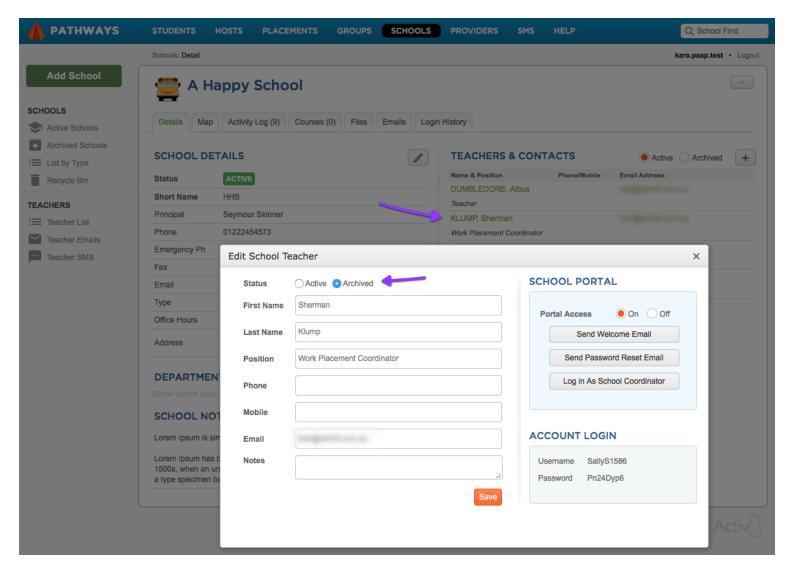
- Are there any hosts that are now out of business that you need to archive?
- Are there any hosts that are unsuitable for placements in the future?
- Archive them and be sure to indicate the reason and a note. This helps in the future if the host pops up again and you need to know why they were archived originally.



#### **ARCHIVE DEPARTING TEACHERS**



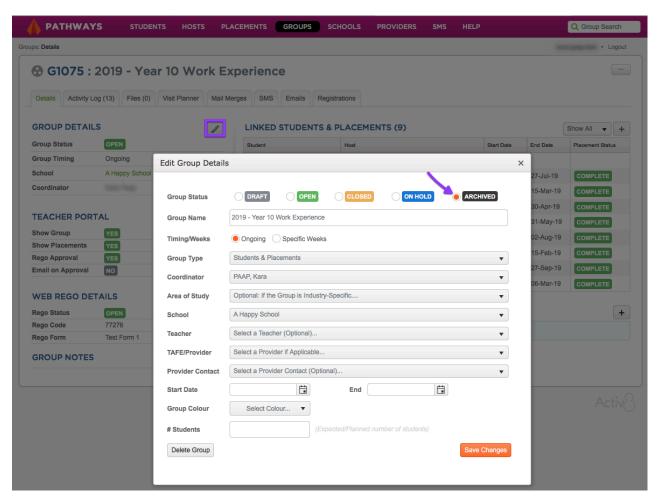
Archive any teachers that won't be at your school next year – their history is retained.



#### **ARCHIVE GROUPS**



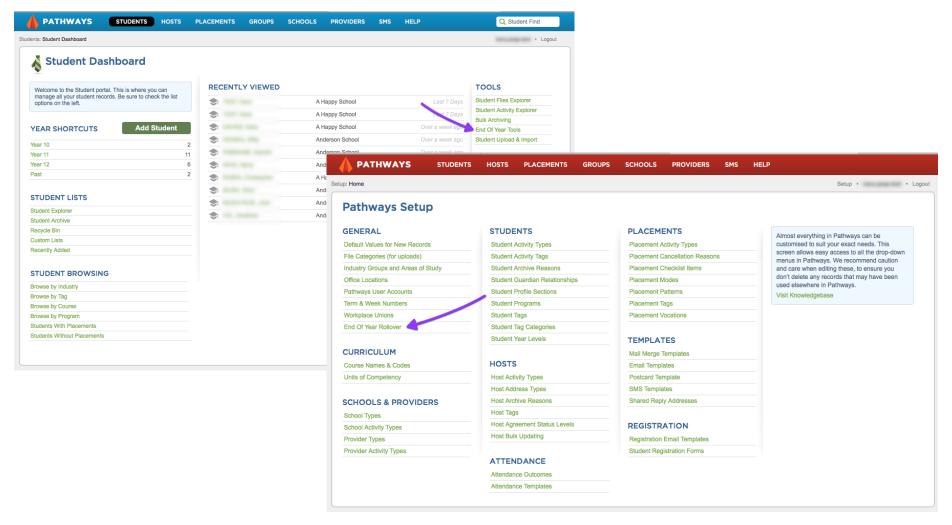
- Archive groups from the current calendar year so you aren't tripping over them.
  Check the Open, Closed and On-Hold Class Lists
- If you are really prepared, **create NEW groups** for next year **never rename existing groups** so they can be used for multiple years unless the group is truly a multi-year cohort.



#### **END OF YEAR TOOLS**



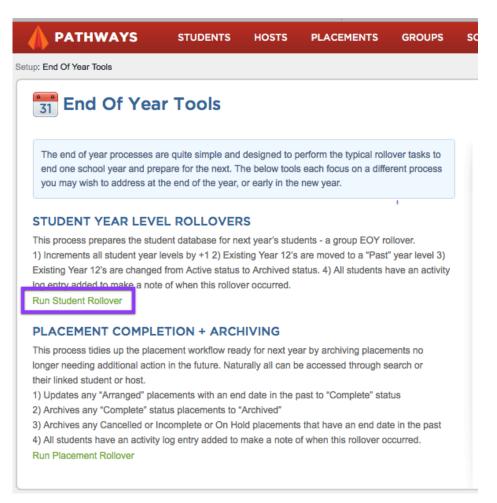
You are now ready run the Student Rollover and Placement Rollover. You can find the End of Year tools on the student dashboard in the right column or in the Setup menu - <a href="https://pathways.cloud/Coordinator/EOY">https://pathways.cloud/Coordinator/EOY</a>



### **END OF YEAR TOOLS – STUDENT ROLLOVER**



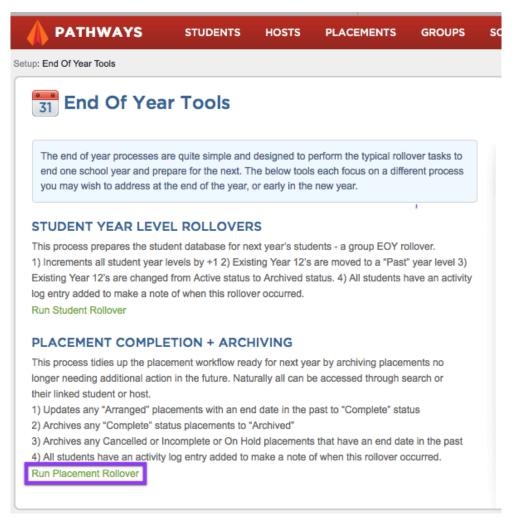
This is an automated process whereby student year levels are increased by one, and Year 12's are moved into the "Past" and "Archived" status. Archived students retain all their details, but are changed to the Archived status so they are accessible but you aren't tripping over their records in the future.



#### **END OF YEAR TOOLS – PLACEMENT ROLLOVER**



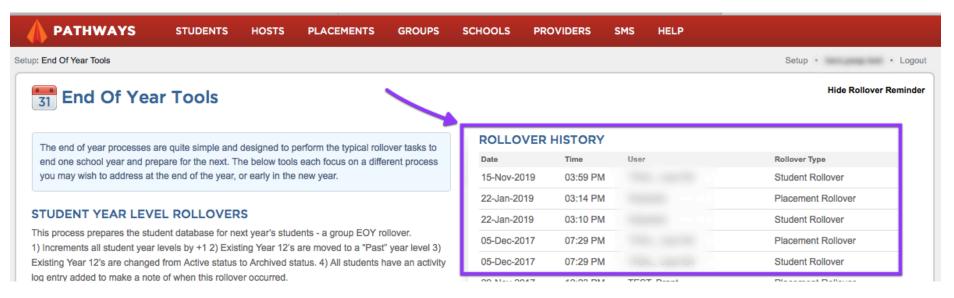
The EOY rollover for placements does a general tidy up and archive of placements. All details are retained as placement history is invaluable in future years, however we keep the pending/arranged/complete placement pipeline clear ready for next year's placements.



### **END OF YEAR TOOLS - CONTINUED**



After the rollover is complete a new history item will be added so you can easily see if it's already been run and to alert you in the situation where it's being run twice.



## The state of Sear Tools

The end of year processes are quite simple and designed to perform the typical rollover tasks to end one school year and prepare for the next. The below tools each focus on a different process you may wish to address at the end of the year, or early in the new year.

#### STUDENT YEAR LEVEL ROLLOVERS

This process prepares the student database for next year's students - a group EQ rollover.

1) Increments all student year levels by +1 2) Existing Year 12's are moved to a Past" year level 3) Existing Year 12's are changed from Active status to Archived status. 4) All stidents have an activity log entry added to make a note of when this rollover occurred.

Note: A student rollover has been run within the last 9 months. Contact the Helpdesk if you need to re-run a rollover or need assistance.