

CIVICA



CES 1.10x End of Year Procedure 2022

11 November 2022

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Overview

This document is designed as a guide for the End of the Year procedure in CES.

As part of the End of Year procedure, the Advance Academic Year (AAY) process needs to be run. This process creates the enrolment details records for students for the next calendar year.

The AAY process can be partially run on multiple occasions before the end of the current year in order to plan for the next academic year in terms of Roll Groups, Timetabling and Billing, however this document focusses on running the process after the last day of term.

This document covers the scenario where the AAY process is run

- After the last day of term 4 of 2022

For Finance End of the Year processes can be completed when all processing for the year is complete.

Steps and processes included in this document are:

- School Admin
 - Preparation tasks to complete before running the AAY process
 - Running the Advance Academic Year (AAY) process
 - Post AAY tasks
 - Tasks for the new year
- Finance End of the Year
 - New year setup
 - Processing and End of Month
 - EOY process
- Billing End of Year
 - Debtor Account Deactivation

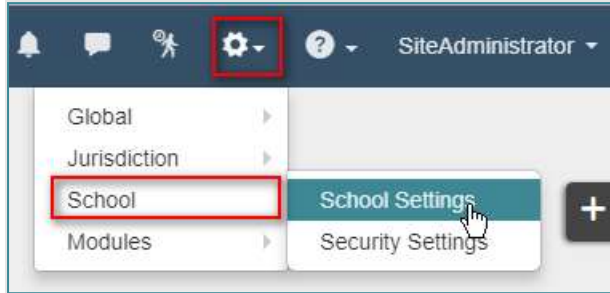
Preparation for End of Year in School Admin

These preparation tasks can be done prior to the end of term 4.

Step 1: Check Academic Years Table

Confirm that the School Academic Years table is configured correctly for your school.

1. From the top Toolbar select Settings | School | School Settings



2. Click **Academic Year** from the left menu and confirm the correct **Exit Year** is selected in the table (this may be Pre-School or Year 7 for example).

Year Level	School Code	Sort Order	Active	Exit Year	Next Academic Year	Next Enrolment Type	Acara Code	
Child Care	OCC	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Pre-School	Part-time		Edit
Pre-School	PRE	2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Prep	Full-time		Edit
Prep	REC	3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Year 01	Full-time		Edit
Year 01	01	4	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Year 02	Full-time		Edit
Year 02	02	5	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Year 03	Full-time		Edit
Year 03	03	6	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Year 04	Full-time		Edit
Year 04	04	7	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Year 05	Full-time		Edit
Year 05	05	8	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Year 06	Full-time		Edit
Year 06	06	9	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Year 07	Full-time		Edit
Year 07	07	10	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				Edit

3. Confirm that the **Next Academic Year** is correct for each year and that the **Next Enrolment Type** is selected i.e., Pre-School students may be changing from Part-time status to Full-time status for the next academic year.

Note: If there are multiple year groups within an Academic Year, for example a Kindergarten year level that contains 3yr old students and 4 yr old students, the 3yr old students may need to be flagged as 'Repeating' students to ensure that their academic year level does not increment after the AAY process is run. See 'Flag Repeating Students'.

Step 2: Check Current Calendar Setting

Before running the AAY process the current calendar setting needs to be verified as correct.

Note: It is important that the current calendar is set to the current school year that is ending, before the Advance Academic Year task is run.

If a future calendar year is selected as a Current Calendar Year before the task is run, all student enrolment records will be in the wrong year.

The current calendar is viewed by navigating to **Settings | School | School Settings** and then selecting **School Calendar**.

The current year is indicated by a tick next to current calendar field.

Step 3: Check Next School Calendar Year

The School Calendar for each year is only available once it has been set up by Jurisdiction at the Global Calendar level and then published to schools. Only users with 'Jurisdiction' access flagged against their permissions in 'Security Settings' will have access to the Global calendar.

As the AAY process needs to extract date information for the next school calendar year, this information must be available prior to running the process.

Click on the drop-down arrow in the Year field to ensure the next year is available. Click on 2022 to review the next calendar year settings.

Note: Only CHECK that the next year is there – DO NOT select it as the 'Current Calendar' this point.

See **Appendix** at the end of this document for information relating to the Jurisdiction set up of the Global Calendar.

Step 4: Review Exiting Students

Graduates:

All students in the final year at your school (Graduating students) will be given an **Exit Date** and can be made '**Historical**' as part of the AAY process, so this information does not need to be manually entered on to their records.

If a Destination School is required, this needs to be entered separately either individually via a student's record, or in bulk using the Quick Edit functionality. **This cannot be done until students have an Exit Date and Reason for Leaving entered.**

(Entering a Destination school allows the **Transferring Students** process to be completed. See Online Help for further details).

Non-Graduates:

Any students who will be leaving your school before, or at the end of this year **who are not graduating**, should have an 'Exit Date' entered on their record. This is so that new enrolment detail records are not created for them in the new calendar year.

Notes: If new enrolment detail records are created for a student in the new year in error, this can be rectified using the No Show functionality.

To enter an Exit Date for students who are leaving (required for non-graduates only):

1. Locate the required Student Information page and select the **Enrolment** section of the record.

The screenshot shows the 'Student Information' page for a student named Renata Ennis. The page includes a header with '+ Add New', 'Expand All', 'Actions', and 'Print' buttons. The student's name, year (Y01), roll group (Y1BA), and home address (20 Balgarup Drive, GOSNELLS WA 6110) are displayed. Below this, there are tabs for 'Demographic' and 'Profile'. At the bottom, a 'Go to:' menu lists various sections: Person, Student, **Enrolment** (highlighted with a red box), Family & Contacts, Documents & Notes, Custom Fields, Medical, Disability, Religion, Alerts, and More.

2. Click **Edit**.
3. Enter the mandatory fields of **Exit Date** (can only be from today onwards) and **Reason for Leaving**. Destination school can be entered at this point if known.
4. If the Exit Date is for today, change the Status from '**Current**' to '**Historical**'.

The screenshot shows a student record form with the following fields and values:

- Status:** Historical
- Enrolment Category:** Active school
- Academic Year of Entry:** PRE
- Date of Entry:** 06/05/2021
- Previous School:** (Empty)
- Exit Date:** 21/09/2021
- Origin:** -Select-
- Reason for Leaving:** Exited
- Destination School:** (Empty)
- Enrolment Type:** Full-time
- FTE:** 1.00

Notes: Exit Dates can only be added via the Enrolment section for dates *from today or in the future*.

To enter an Exit Date for a student which is *in the past*, the 'No Show' functionality would have to be used. This allows the system to remove any unmarked or unexplained absence attendance records that were created for the student after this past date. See Online Help for further details.

Student status can only be marked as 'Historical' when entering an Exit Date for the current day, or subsequently once the Exit Date has passed.

Attendance records cease to be built for a student once an Exit Date (or last day of term if sooner) has passed, irrespective of whether the student status is Current or Historical.

5. Click **Save**.

Step 5: Repeating Students

Review Existing Repeating Students

For Students who are repeating their academic year this year (2022) and not repeating their current academic year next year, the repeating field in their student record needs to be updated. This is so that when the AAY process is run, enrolment details are created for them in the new year with their Academic Year incrementing.

1. Navigate to School Admin > Students > Student Find
2. Under Current Enrolment section, select **Yes** in the **Repeat** field and click **Find**

The screenshot shows the 'Student Find' search interface. Under the 'Current Enrolment' section, there are several input fields: Student ID, Date of Entry (with a calendar icon), Academic Year of Entry, Roll Group, and Campus. On the right side, there are fields for Name, Academic Year, Status (set to 'Current'), and a dropdown for 'Repeat' which is currently set to 'No'. The 'Repeat' dropdown is highlighted with a red box.

If there are no current students flagged as repeating, the following message will display on the Search Results screen.

The screenshot shows a message box with the title 'Student Find' and the text 'No results found for the entered search criteria.' The message is displayed on a yellow background.

3. If a Search Results list is returned, select students individually (Hint: use the <Ctrl> key on your keyboard or click **Select All** to select the students

The screenshot shows the 'Student Find - Search Results' table. The table has columns for Surname, First Name, Middle Name, Preferred Name, Preferred Surname, Student ID, Date of Birth, Gender, Academic Year, Roll Group, Enrolment Type, and Date of Entry. Two students are listed: 'Ade' and 'Scott'. The 'Repeat' checkbox for the first student is highlighted with a red box.

Surname	First Name	Middle Name	Preferred Name	Preferred Surname	Student ID	Date of Birth	Gender	Academic Year	Roll Group	Enrolment Type	Date of Entry
Ade	Cullen	David			302021676	7/31/2018	M	06	95A	Full-time	30/01/2021
Scott	Robert	John	Rob		3020123	18/09/2008	M	06	97A	Full-time	05/09/2020

4. Click View Selected
5. Under the Current Enrolment section, click the **Edit** button
6. Click on the **Repeat** checkbox to untick

The screenshot shows the 'Demographic Profile' section for a student. Under the 'Current Enrolment' section, there are several input fields: Student ID, ID Card Expiry Date, Previous Student ID, House (set to 'Gold'), Roll Group (set to 'Y5A'), Campus (set to 'Carter Primary School'), and Academic Year (set to 'Y05'). The 'Repeat' checkbox is highlighted with a red box.

7. Click **Save** in the Enrolment section

- Click on the **Next Record** button and repeat for any further students



Note: If multiple students are no longer repeating, this data entry can also be done via the Quick Edit functionality. See Online Help for further details.

Flag Repeating Students

Students who will be repeating their current academic year need to be flagged as such on their student record. This is so that when the AAY process is run, enrolment details records are created for them in the new year, but their Academic Year is not incremented (For example 3yr old KINDY students remaining in KINDY in the new year).

- Navigate to the required Student Information record
- Under the Current Enrolment section, click **Edit** button
- Click on **Repeat** checkbox

- Click **Save** in the Enrolment section
- Repeat for any further students

Notes: If multiple students are repeating, this data entry can also be done via the Quick Edit functionality. See Online Help for further details.

When the AAY process is run the Repeat flag setting on the student's current enrolment detail record will be copied to their future enrolment detail record. The Repeat flag on the future record does not need to be reviewed/updated until the end of year procedure for 2023.

Step 6: Review 'Passive' Students

In CES, 'Passive' is a status that can be applied to students who have a period of consecutive 'Unexplained' absences. The period of unexplained absences where schools or Jurisdictions determine that a student may need to be marked as Passive may vary. Schools should consult their school leadership or Attendance Policy before marking students as Passive.

A status of Passive against a student's record will produce the following results:

- No change to attendance data up to the start date used for the Passive status
- From the Passive start date forwards, the student will have a Daily Attendance Status of 'Passive' and the Half Day Absence count will be calculated as 2

Before the AAY process is run at the end of the year, ALL students with a status of 'Passive' should be reviewed. There are two options for dealing with Passive students.

1. End date the Passive record
 - This will update the student's enrolment and attendance will be built as normal from the day after the Passive end date. The AAY process will update the student's enrolment detail record for the new year with attendance starting from the beginning of Term 1
 - If the student needs to be flagged as Passive at the start of the new year, a new passive record needs to be created.
2. End the student's enrolment
 - If the student is confirmed as leaving or having left the school, they can be marked as Historical and an exit date entered (Note: This cannot be done while the student has an open passive record, so option 1 must be completed first)

Warning: If neither of the above is done and the AAY process is run, the student will have a future year enrolment detail record with a continued status of Passive, but this Passive attendance record will continue to be 'linked' to the previous year enrolment record. This will have an impact on Reporting.

To review students who are currently Passive:

1. Navigate to School Admin | Students | Passive Students
2. Re-sort the grid to locate all students where the Passive record does not have an end date.
(Hint: You may need to clear the sort on Surname before you sort by Date)

Surname	First Name	Academic Year	Roll Group	House	Status	Start Date	End Date	Notes
Nicholas		02	2025		Under Investigation	11/09/2022		
Hannah-Lee		02	2025	YELL/2W	Whereabouts Unknown	09/11/2022		

- Review the students listed. The easiest way to review each student is to open their Student Information page in a new tab, perform any necessary actions (see below), close the tab and then return back to the Passive Students grid tab. Repeat the process for further students in the grid.

Note: This information can be exported to Excel for checking purposes. You may also want to adjust the grid view to display more results (up to 50 per page).

To end the Passive status of a student:

- Right click on the **Surname** hyperlink to open the Student's Information record in a new tab
- The student's Information page will open. From the Actions button, select End Passive



- Enter the Passive End Date, a note if required, and click Save (Note: Passive End Date can be back dated by up to 7 days). The Passive Status change is then confirmed.

- Close the tab and return to the Passive Students tab.
- Repeat as necessary.

Note: Check all Students who have a Passive Status have an end date to their Passive record before continuing.

To end an enrolment record for a student:

1. Right click on the Surname hyperlink to open the Student's Information record in a new tab
2. Open the Current Enrolment section of the student record and click **Edit**
3. Change the Status from 'Current' to 'Historical' (See Step 4. Review Exiting Students for further information about status).
4. Enter the mandatory fields of Exit Date (can only be from today onwards) and Reason for Leaving. Destination school can be entered if known.

Note: To enter an Exit Date in the past the 'No Show' functionality would have to be used. See Online Help for further details.

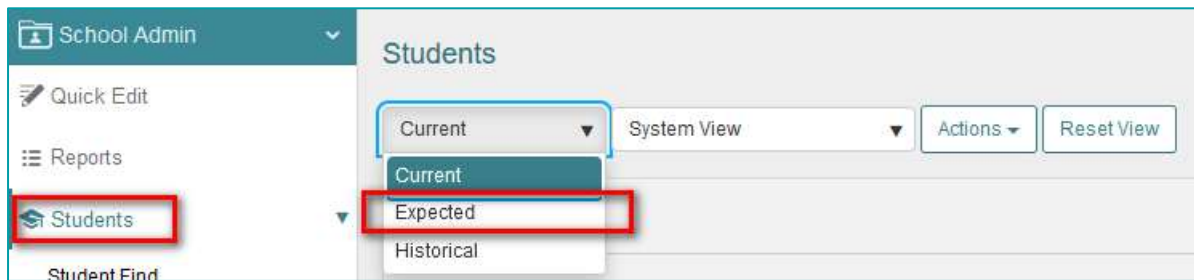
5. Click **Save**
6. Close the tab and return to the Passive Students tab
7. Repeat as necessary

Step 7: Review Existing Expected Students

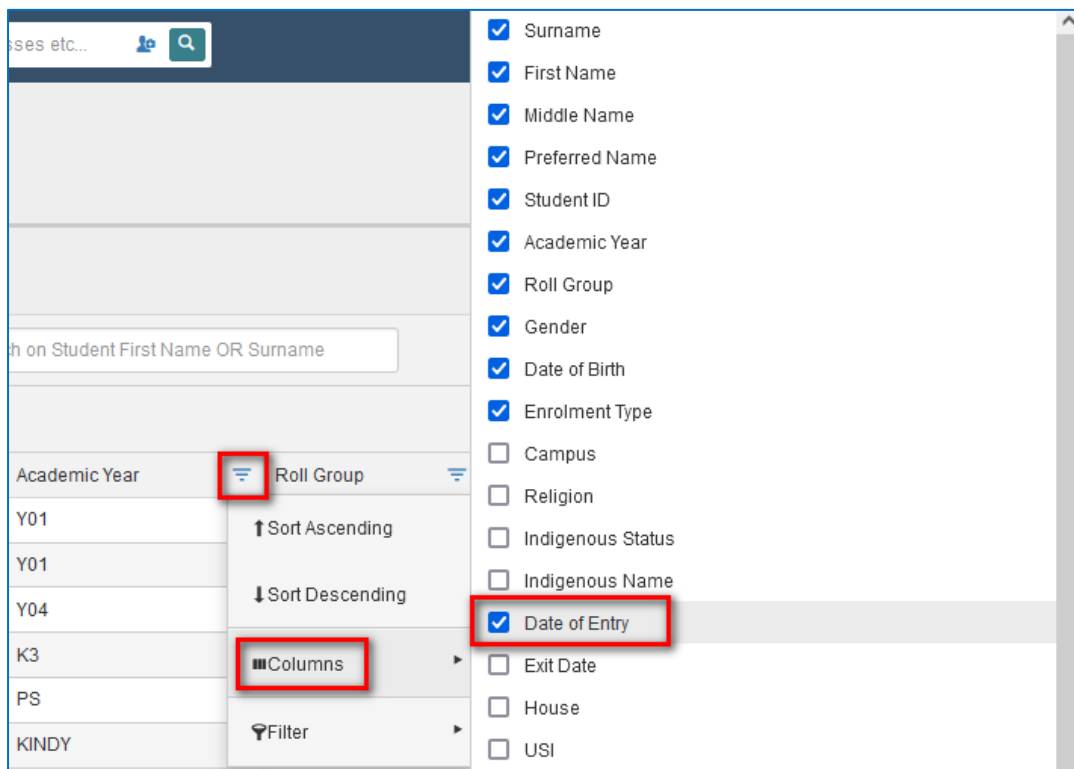
Students who have status of 'Expected' that did not show up at the school, need to be removed or their entry date moved to later date. For these students, the 'No Show' functionality would have to be used.

To find a list of students with a status of 'Expected':

- Navigate to School Admin > Students
- On the Students landing page, click on the 'Current' drop-down box and select 'Expected'



- Click on one of the column chevron arrows and select Date of Entry to display this column on the grid



- Review the list
- Click on Surname hyperlink for student that has status of 'Expected' and 'Date of Entry' with past date or in year 2022

Students

Control Future Calendar 2021-2022

Expected System View Actions Reset View Add New

Search on Student First Name OR Surname

Drop a column header and drag it here to group by that column

Surname	First Name	Student ID	Academic Year	Roll Group	Gender	Date of Birth	Enrolment Type	Date of Entry
Kale	Marion	20212021028	ES	85A	F	20/06/2009	Full-time	25/06/2022
Sears	Mal	20212021118	T2		M	01/12/2002	Full-time	31/08/2022
Waters	Sarah	20212021116	PRE	89A	F	20/10/2015	Full-time	06/07/2022

Export to Excel 1 - 3 of 3 items

- Select Actions>No Show and choose whether to 'Remove the Student Enrolment' or 'Move the student start date to a later date'

Student No Show

Options Process Confirmation

Set as No Show: Marion Kale

Existing Enrolment Start Date: 22/08/2022

Existing Enrolment End Date:

Do you want to:

Move the student start date to a later date?

Move the student end date to an earlier date?

Remove the student enrolment?

Next Cancel

Notes: It is very important to update students with status of 'Expected' and 'Date of Entry' of past date or in year 2022 via 'No Show' functionality before running AAY process.

There are Business Rules attached to the No Show process so some details (including any attendance records other than Unexplained or Unmarked), may need to be updated.

Step 8: Transfer Future Students (Optional)

If you have not already done so, it is recommended to run the Transfer Future Students process before the AAY. This creates enrolment records for any **Future Students** that are due to attend the school in the new year, with a status of 'Expected'.

As part of the AAY process the 'Expected' students' status can be updated to 'Current'.

Note: If preferred, the Transfer of Future students can be done separately in the new year.

To Transfer Future Students (see Online Help for a more detailed description):

1. Select menu item Transfer & Roll-over
2. Select Transfer Future Students
3. Select the appropriate **Calendar Year** from the drop-down menu.
4. Select the appropriate **Application Status** required for example 'Confirmed' or 'Accepted'.
5. Add the **Entry Date** column to the grid if required to aid correct selection of students in step below.
6. Select students individually (Hint: use the <Ctrl> key on your keyboard or click **Select All** to select the students to transfer.

Note: The transfer of Future Students where their Enrolment Type is due to be Part-time, should be done as a separate batch to other students who will have Full-time enrolment type.

7. Click **Process**
8. Enter the **Enrolment Start Date** as the first day of school in the new year. (Attendance records will start to build from this date).
9. Select **Expected** from the dropdown for **Student Status**
10. Select an Enrolment Type and an FTE.
11. Click **SAVE**

Note: All transferring students in this batch will be given the same details as entered in steps 8-10.

Advance Academic Year Process

The Advance Academic Year process will:

- Create enrolment detail records for the next school calendar year, for students continuing at the school in that new year.
- Give all graduating students an Exit Date, with the option to change their status to 'Historical'.
- Advance the academic year for 'External' students.
- Change 'Expected' status students to be 'Current' if required.
- Advance roll groups if required.

Note: It is important that steps '2. Check Current Calendar Setting' and '3. Check Next School Calendar Year' have been completed before proceeding with this process.

Step 9: Running the Advance Academic Year

1. Select menu item Transfer & Roll-over
2. Select Advance Academic Year
3. The Academic Years table will display. The settings displayed here should be correct after following Step 1 of this document. If they are not correct, they can be edited at this point.

Current Academic Year	Next Academic Year	Next Enrollment Type
00C	PRE	Part-time
PRE	REC	Full-time
REC	01	Full-time
01	02	Full-time
02	03	Full-time
03	04	Full-time
04	05	Full-time
05	06	Full-time
06	07	Full-time
07		

Advance Academic Year (Default options)

Exit date for the graduates:	<input type="text" value=""/>
End date for the current school year:	<input type="text" value="16/12/2022"/>
Start date for the next school year:	<input type="text" value="30/01/2023"/>
Should all 'Expected' students for 2023 become 'Current'?	<input type="text" value="-Select-"/>
Should all graduates become 'Historical'?	<input type="text" value="No"/>
Advance Roll Groups?	<input type="text" value="-Select-"/>
Recalculate Student Order in Billing?	<input type="text" value="No"/>

4. Exit date for the graduates:

Enter the date that graduates will be leaving. This could be the end of term date but may be an earlier date.

Notes: On the Student Information Page, the 'Exit Date' and 'Reason for leaving' (graduated) will be updated after the AAY process. Only final year students *without a pre existing Exit Date* will be updated.

If an exit date already exists on a final year Student's record (the date has been manually entered) this will not be overwritten.

5. End date for the current school year and Start date for the next year:

These fields are automatically populated from the term dates according to the current and new calendar years (See steps 2 and 3 of this document).

6. Should all 'Expected' students for 2023 become 'Current':

- If **'Yes'** is selected, students with a status of 'Expected' will be updated to 'Current'.
- If **'No'** is selected, students will retain the status of 'Expected' in the new year. These students will need to have their status changed manually to 'Current' in the new year. This can be done on an individual basis or in bulk using the Quick Edit function.

7. Should all graduates become 'Historical'

This option will only be available for selection if the Exit Date entered for the graduates is a date in the past.

As this process is being run after the last day of Term 4, select **Yes**.

Once the process has run, the status displayed on the Students' Information page will update from 'Current' to 'Historical'.

Note: Once students have a status of 'Historical' they can no longer be billed in Billing. If a Historical student still has outstanding debts attached, any follow up would need to be processed in the school's finance application.

8. Advance Roll Groups

Yes, should only be selected where ALL students in each Roll Group will advance to the same new Roll Group. Where students will be re-organised across different new Roll Groups, **No** should be selected.

Note: If 'No' to Advance Roll Groups is selected, students can be assigned in bulk to new Roll Groups at a later date by using the 'Assign to Roll Group' function available on the Students landing page 'Future Year 2023-2023' tab.

This tab is only visible after the AAY has been run. Once the new calendar year of 2023 is set as the 'Current' calendar year, this tab is then no longer visible. Assigning Roll Groups would then need to be done through Quick Edit or through individual student records.

(See Assigning Roll Groups in Online Help for further information).

- a. If **Yes** is selected, the Current and Next Roll Group table will display. 'Next Roll Group' information may already be displayed here if the 'Roll Groups' data reference table in School Admin has been preconfigured.

Edit Roll Groups	
Current Roll Group	Next Roll Group
01.1	02.1
02.1	03.1
03.1	04.1
04.1	05.1
05.1	06.1
06.1	
07.1	
08.1	
08.2	
08.3	
08.4	

- b. If any of the 'Next Roll Group' information is blank or incorrect, click **Edit Roll Groups**

Name	Description	Room	Staff	Alternate Staff	Loc.	Act.	Next Roll Group	Exit Roll Gro...		
01.1	Roll Group 01.1	01	Andrea Ainsley	Wayne Latimer		☑	02.1		🗑️	Edit
02.1	Roll Group 02.1	02	Petrina Blue			☑	03.1		🗑️	Edit
03.1	Roll Group 03.1	03	Neil Branson			☑	04.1		🗑️	Edit
04.1	Roll Group 04.1	04	Sarah Burton			☑	05.1		🗑️	Edit
05.1	Roll Group 05.1	05	Keith Edgington			☑	06.1		🗑️	Edit
06.1	Roll Group 06.1	06	Wayne Ferguson			☑			🗑️	Edit
07.1	Roll Group 07.1	07				☑			🗑️	Edit
08.1	Roll Group 08.1	A2				☑			🗑️	Edit
08.2	Roll Group 08.2	08	Pearl Jenkins			☑			🗑️	Edit
08.3	Roll Group 08.3	DR1	Eddy Gardner			☑			🗑️	Edit

10 items per page [Export to Excel](#) 1 - 10 of 32 items

[+ Add New](#)

[Close](#)

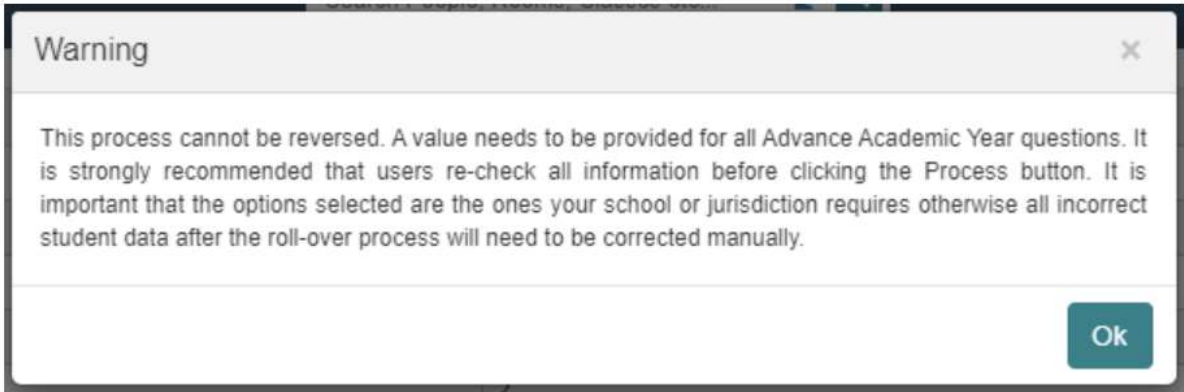
- c. Click **Edit** for each Roll Group and enter the Next Roll Groups for each line.
- d. Review/Assign the correct teachers to the Roll Groups.
- e. Ensure all Exit Roll Groups (Graduating classes) are flagged.
- f. Click **Close** to finish.

9. Recalculate Student Order in Billing

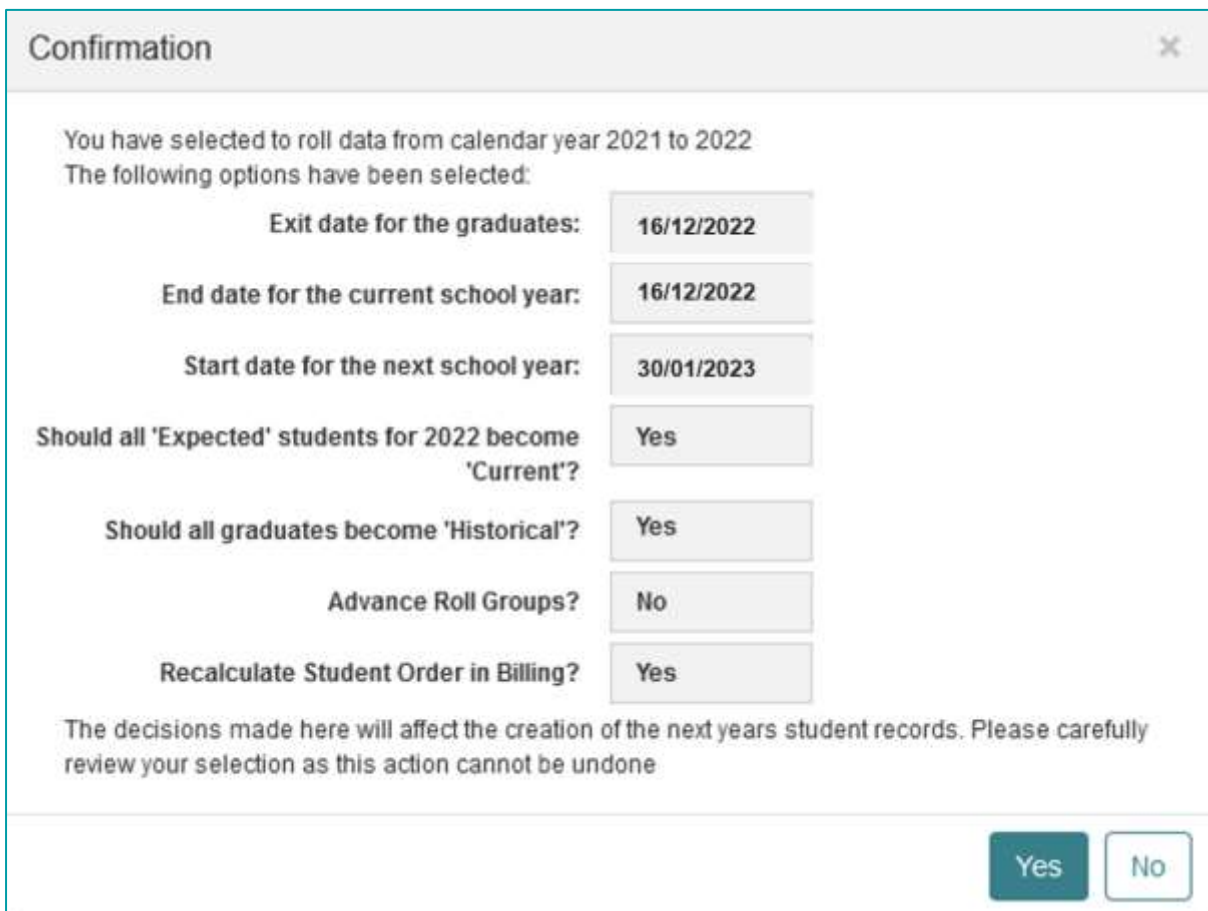
- a. As the AAY is being run at the end of the school year, select 'Yes' to reorder students within a Debtor Account to take account of exiting and new students.

Please confirm that all data is correct before clicking Process as this cannot be reversed and data will have to be corrected manually if an error is made.

10. Click **Process**. The following warning message will display:



11. Click **OK** and view the confirmation of options selected:



12. Select **Yes** to complete the process.

A summary of the tasks completed by the Advance Academic Year process will then display.

Note: When the school has run the Advance Academic Year process and has not yet flagged the future calendar year to the current calendar year (step 15), the School Calendar field is available on the *Student Find* page and the *Adhoc Reports Data Selection* page. This field allows the user to choose whether they want to work with the students in the current year or the future year.

Post Advance Academic Year Tasks

Step 10: Data Check

From the **Students** menu landing page, click on the 'Future Year 2023-2023' tab

1. Filter or sort the grid to check that there is the correct number of 'Current' (and 'Expected' if appropriate) students for the new year.
2. If the Advance Roll Groups option was selected as part of the AAY process, check that the correct students are assigned to each new Roll Group by grouping the grid by Roll Group. Future Year Roll Group Lists can be exported to Excel for further checking as required.

If Roll Groups were not assigned as part of the AAY process, see below:

Step 11: Assign Roll Groups (Option 1)

Students can be assigned to new Roll Groups from the **Future Calendar** tab on the Students landing page grid.

Note: This can only be done before the new year (2023) is marked as the Current Year in the School Calendar. After that, students must be assigned to new Roll Groups using Quick Edit (See Step 16).

1. Navigate to **Students** and click on the **Future Calendar 2023-2023** tab.
2. Click Assign to Roll Group

Surname	First Name	Student ID	Academic Year	Roll Group	Gender	Date of Birth	Enrollment Type	Status
Avon	Quinn	12315196A	FRE	Kado	M	02/01/2016	Part-time	Current
Benson	Samantha	944330511H	FRE	Etha	F	09/03/2016	Part-time	Current
Berry	Alex	12315198F	12	12B	M	11/06/2004	Full-time	Current
Downing	Uma	123599218L	12	12A	M	28/04/2003	Full-time	Current

3. Use the Student Find screen to select a group of students (Hint: Select a Roll Group or Year level at a time).
4. Click **Select All** and **Add** to add students to the Assign Roll Group screen.

Student Find - Search Results

Select All Unselect All Add Find Again?

How **Ctrl** or **Shift** to multi-select

Surname	First Name	Middle Name	Student ID	Preferred Surname	Legal Surname	Date of Birth	Gender	Academic Year	Roll Group	Enrollment Type
Blanks	Jess					11/05/2001	F	09	MUS1	Full time
Crook	Sebastian		20150021000610			04/02/2001	M	10	MUS1	Full time
Doyle	Clayton	David	20150021000604			17/06/2000	M	11	MUS1	Full time
Dwyer De Vries	Kyrin	Thomas	20150021000602			20/11/2001	M	10	MUS1	Full time
Hessen	Hanson	Jackson	20150021000501			19/01/2000	M	10	MUS1	Full time
Mains	Alexis		20150021000504			07/11/2001	F	09	MUS1	Full time
McCartell	Viola	T Joseph James	20150021000549			16/09/2000	F	09	MUS1	Full time
Michaels	Joanne	Phoebe				01/02/2000	F	11	MUS1	Full time
Monte	Franc					10/11/2000	M	10	MUS1	Full time
Monica	Ashleigh	Shayne	20150021000520			10/09/2000	F	11	MUS1	Full time
Murray	Bernette	Colinda Leanne	20150021000537			21/05/2000	F	09	MUS1	Full time
Sapina	Louis	Oliver	20150021000511			05/06/2000	M	10	MUS1	Full time
Sheerin	Muzammil	Nicou	20150021000506			14/04/2001	M	09	MUS1	Full time

1 20 Items per page Export to Excel 1 - 13 of 13 items

5. Select a new Roll Group to assign students to.

Assign Roll Group

New Roll Group

- Highlight students to assign to this Roll Group and click **Apply** (The new Roll Group will be assigned).
- This can be saved at this point OR
- Continue to select new Roll Groups and assign required students.
- Click **Save** to finish.

Assign Roll Group

New Roll Group

Current Students Use **Ctrl** or **Shift** to multi-select

Surname	First Name	Student ID	Academic Year	Old Roll Group	New Roll Group
Blanks	Jess		10	MUS1	RC1
Crook	Sebastian	20150021000610	11	MUS1	MUS2
Doyle	Clayton	20150021000604	12	MUS1	RC1
Dwyer De Vries	Kyrin	20150021000602	11	MUS1	MUS2
Hessen	Hanson	20150021000501	11	MUS1	MUS2
Mains	Alexis	20150021000504	09	MUS1	OS02
McCartell	Viola	20150021000549	10	MUS1	OS02
Michaels	Joanne		12	MUS1	OS02
Monte	Franc		11	MUS1	MUS2
Monica	Ashleigh	20150021000520	12	MUS1	RC1
Murray	Bernette	20150021000537	10	MUS1	RC1
Sapina	Louis	20150021000511	11	MUS1	MUS2
Sheerin	Muzammil	20150021000506	10	MUS1	RC1

1 20 Items per page 5 student(s) selected Export to Excel 1 - 13 of 13 items

10. Repeat Steps 2 to 9 for all students in the school.

Step 12: Review Student Status

Any students who have already left your school that still have a status of 'Current' should be reviewed and their status changed to 'Historical' if applicable.

To review the status of students who have already left:

1. Click on the **Students** menu to view the '**Current**' students tab.

Students

Current Future Calendar 2022-2022

Current System View Actions Reset View

Search on Student First Name

Drag a column header and drop it here to group by that column

Surname	First Name	Middle Name	Preferred Name	Student ID	Academic
Adalja	Devina	Delray	Devyx	0038	REC
Adam	Smith			414 12121	8
Admans	Ken	Heppner	ken	64007	Code6

2. Click on one of the column chevron arrows and select **Exit Date** to display this column on the grid.

Students

Current Future Calendar 2021-2021

Current System View

Drag a column header and drop it here to group by that column

Surname	First Name	Middle Name
Ade		
Ahmadi		
Ahmadi		
Ahmed		
Ahmed		

- Middle Name
- Preferred Name
- Student ID
- Academic Year
- Roll Group
- Gender
- Date of Birth
- Enrolment Type
- Campus
- Religion
- Indigenous Status
- Indigenous Name
- Date of Entry
- Exit Date
- House

- Sort the Exit Date column into descending order. Any students with an Exit Date in the past can be marked as 'Historical'.
- For each student, right click the **Surname** link to open their Student Information page in a new tab and change the Enrolment Status to Historical.
- Save** the changes and close the tab.

Step 13: Transfer Historical Students to Past Members (Recommended but Optional)

All students that have left the school and have a status of Historical can be transferred to **Past Members** if required.

- Navigate to Transfer & Roll-over | Transfer to Past Members.

Surname	First Name	ID Number	Date of Birth	Age	Home	Exit Grade	Exit date	Reason for Leaving	Role
Carroll	Nail		01/05/2005	12	O'SULLIVAN (Diogen)	07	05/04/2017	Enrolled in home schooling	Student
Adams	Anne	2017032	21/04/2004	13		08	27/06/2017	Enrolled in home schooling	Student
Thorp	Flynn	20150521000494	12/09/2001	16	O'SULLIVAN (Diogen)	09	29/06/2017	No longer resident in state	Student
Doyle	Caylor	20150521000604	17/05/2000	17	Musk House (Dawn)	10	27/03/2017	Missing	Student
Darvill	Lectian	20150521000605	10/12/1999	18	Roe (Blue)	11	23/02/2017	Enrolled in other school	Student

- To review the record (s) click on a **Surname** hyperlink (the record will open in a new browser tab).
- Back on the grid **highlight** the record(s) you wish to transfer or click **Select All** to transfer all records in bulk.
- Click Process
- Review the Caregiver options displayed:

If a caregiver option is selected, a separate 'Past Member' record will be created for the caregivers linked to historical students (unless they have other children remaining at the school).

1 past member will be transferred. ✕

Please indicate which groups of caregivers, if any, you would like to be given past membership.

Primary Caregivers

Secondary Caregivers

OK
Cancel

6. Click **OK** to process and view the Confirmation message.

Records can now be viewed from the Past Members grid.

Step 14: Transferring Students between Schools (Not applicable for Independent Schools)

All Students leaving your school will appear in **Exiting Students**, and all students set to transfer to your school from another school will appear in **Transferring Students**.

Exiting Students

Any clearance checklists or exiting information (such as Destination school) can be entered for students who have left by navigating to:

1. Transfer and Rollover | Exiting Students

All Exiting students will be displayed in the grid for the date range selected and any required information can then be entered by clicking on the Surname link

These students can then be 'transferred' to their destination schools if the schools belong to the same Jurisdiction

Transferring In Students

Any students who have been 'transferred' to your school from another Jurisdiction school via the Transferring Students process can be viewed by navigating to:

2. Transfer and Rollover | Transferring Students

Students shown under the **Pending Incoming** tab can be accepted or rejected as required.

Note: Students can only be transferred between schools where schools belong to the same Jurisdiction. Schools must agree to process transferring students in this way, so please consult your Jurisdiction. Full details on Transferring Students can be found in Online Help.

Step 15: Set up Payment Due dates in CE Finance

Prior to any billing invoices being created in the new year it is important to set up the new Payment Due dates in CE Finance. These payment due dates are then automatically assigned to all new invoices created (both in Billing and CE Finance). The payment due dates are what is used to calculate overdue invoices when receivables are aged.

1. Navigate to Term Codes (AZ2)
2. Select to edit 'E' for 'Education' Term code
3. Click 'Add New'
4. Enter the dates as required by your school
5. Save

The screenshot shows the 'Details' page for a term code. At the top, there are buttons for 'Save', 'Cancel', 'Add Term', and 'Help'. The 'Details' section includes the following fields:

- Trading Terms: E
- Description: Education
- Short Letter: (empty)
- Long Letter: (empty)
- Calculation Method: Number of school terms for payment (4)

Below the details is a 'School Terms' section with a 'Settlement Discount' tab. It contains a table with the following data:

	Year	Term	Start Date	Payment Due Date
<input checked="" type="checkbox"/>	2023	1	01/01/2023	25/04/2023
<input checked="" type="checkbox"/>	2023	2	24/04/2023	16/07/2023
<input checked="" type="checkbox"/>	2023	3	17/07/2023	06/10/2023
<input checked="" type="checkbox"/>	2023	4	09/10/2023	20/11/2023

Note: If payment due dates are not set up prior to invoicing, the due date will be the same as the date the invoice is created.

Tasks in the New Year (2023)

These tasks should be completed *in the new year* and before the first day of Term 1.

Step 16: Update Current Calendar Setting

The Current Calendar Year should be updated to 2023 on or after 1 January 2023 and before the first day of Term 1.

The current calendar is viewed by navigating to **Settings | School | School Settings** and then selecting **School Calendar**.

The current year should display by default and is indicated by a tick next to current calendar field.

- To set the future year as the current year click in the **Year** field and select the new School Calendar Year **2023-2023**

The screenshot shows the 'School Calendar' settings interface. The 'Year' dropdown menu is open, displaying a list of year ranges: 2022-2022, - Select -, 2023-2023 (highlighted with a red box), 2022-2022, 2021-2021, 2020-2020, and 2019-2019. Below the dropdown, there is a 'Teaching Terms' section with a 'Term Name' input field.

- Click on the **Current Year** button to set the new school year.

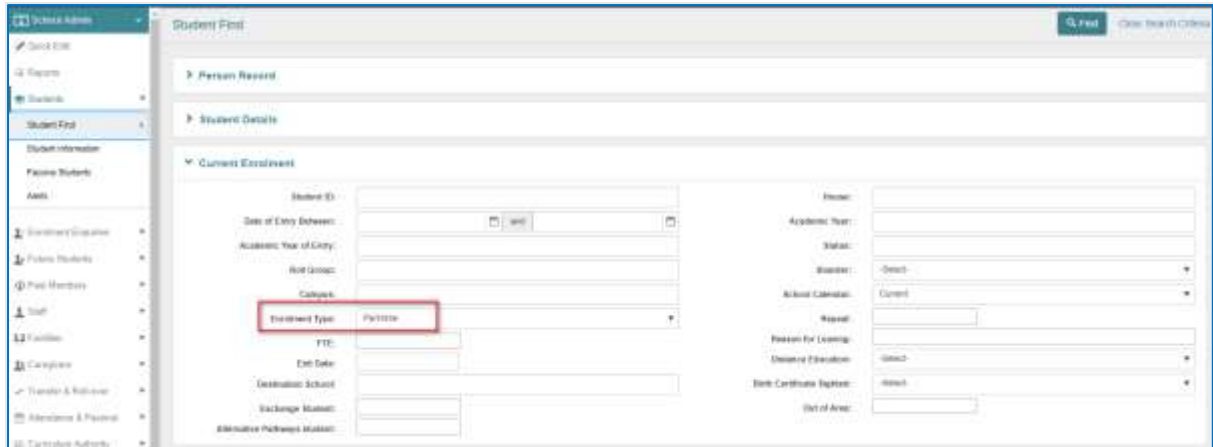
The screenshot shows the 'School Calendar' settings interface after the year has been updated. The 'Year' dropdown now shows '2023-2023'. The 'Year From' field is set to '1/01/2023' and the 'Year To' field is set to '31/12/2023'. A red box highlights the 'Current Year' button.

- If not previously entered add any **Non-Attendance Days** that will occur during the term i.e. Public Holidays or Teacher Professional Development days as required.

Step 17: Review Part-time Students

Any students who have a Part-time enrolment type may need to be reviewed so that the correct attendance records are built for the new school year.

- Navigate to School Admin |Students |Student Find
- Expand the Current Enrolment section and select 'Part-time' in the **Enrolment Type** field.
Click **Find**



The Student Find-Search Results grid can be sorted and filtered for specific Academic Years or Roll Groups if required.

3. Select the student records to review and click **View Selected**.



This will create a browse of students to review.



4. For each student that requires their part-time FTE and/or attendance pattern to be updated, expand the Enrolment section and click **Edit**
5. Click in the **FTE** field and update the value. Review and update the **Attendance Days** if required.

Quinlan Ayala (102310796A)
 PRE Koola 31 Flinders Street School Part-time
 1 Sample Street, Teatulu 5108 Australia
 Shared Living

Go to: Person Student **Enrolment** Family & Contacts Documents & Notes Custom Fields Medical Disability Religion Alerts Background

Enrolment Type: Part-time
 FTE: 0.99
 Attendance Days: W1-AM, W1-FM, W2-AM, W2-FM

6. Once all changes have been made click **Save** in the Enrolment section.
7. Use the browse set navigation tool to repeat for any other students.
8. Alternatively, these students can be updated in bulk using **Quick Edit**. From the **School Admin | Quick Edit** menu select the students required using **Find Current Students**
9. Select the Edit Field of Enrolment Type, FTE and Attendance Days

Quick Edit

Edit Students: **Find Current Students** Find Future Students

Edit Field: Enrolment Type, FTE and Attendance days New Enrolment Type: -Select- New FTE: 0.00

Surname	First Name	Student ID	Academic Year	Current Enrolment Type	New Enrolment Type	Current FTE	New FTE
Adams	Hayley	2017806	PS	Part-time		0.99	
Adams	Therese	2017867	PS	Part-time		0.99	
Allen	David	2017868	PS	Full-time		1.00	
Parcel	Polly	2017822	PS	Part-time		0.99	

10. Select the New Enrolment Type and FTE:

New Enrolment Type: Full-time New FTE: 1.00

11. Highlight the students required and click **Apply**

Surname	First Name	Student ID	Academic Year	Current Enrolment Type	New Enrolment Type	Current FTE	New FTE
Adams	Hayley	2017006	PS	Part-time		0.50	
Adams	Trent	2017007	PS	Part-time		0.50	
Aden	David	2017008	PS	Full-time		1.00	
Parrot	Polly	2017023	PS	Part-time		0.50	

Step 18: Assign Roll Groups (Option 2)

Note: Assigning students in the new year only needs to be done where Roll Groups were not assigned during the AAY process, nor at Step 11 or, you wish to make changes to the Roll Groups already assigned to students.

1. Navigate to School Admin | Quick Edit
2. Click Find Current Students
3. Use the Current Enrolment search section to load a group of students (Hint: Select a Roll Group or Year level at a time).
4. Click Select All and Add
5. Select Roll Group from the Edit Field drop down list.

6. Select a New Value (New Roll Group).
7. Highlight students and click **Apply**
8. Select an effective date (use first day of Term 1 2023).
9. Repeat until all students are assigned to a Roll Group.
10. Click **Save**

Repeat these steps until all students are assigned to the required new Roll Group for 2023.

Step 19: Check Roll Groups

Roll Groups can be checked in several ways.

1. From the **Students** landing page grid, sort by Roll Group (Click once for Ascending) to identify any students without a Roll Group.

Surname	First Name	Student ID	Academic Year	Roll Group	Gender	Date of Birth	Enrollment Type
Adair	Julia	2017945	07		F	09/05/2006	Full-time
Avery	Cyrl	2017063	07		M	01/07/2005	Full-time
Black	adam	2017937	07		M	16/05/2006	Full-time
Davis	John	2017043	09		M	29/10/2003	Full-time
Davis	Lacy	2017942	11		F	05/04/2002	Full-time

2. From the **Students** landing page grid, use Group by Roll Group column. Export to Excel if required. Make any updates as necessary.

Surname	First Name	Middle Name	Preferred Name	Student ID	Academic Year	Roll Group	Gender
▼ Roll Group: RIC3 (Count: 16)							
Agar	Jenny	Mary	Jen		11	RIC3	X
Andon	Tyra	Jean	Ty	2017058	05	RIC3	F
Hayes	Aisling		Aisling		12	RIC3	F
Hobden	Kerry			20150821002003	10	RIC3	F

3. Navigate to **School Admin | Reports**. Search for and select **Students by Roll Group** report. Select the parameters to run the report and print if required.

Report Name	Report Description	Report Category Name	Report Group	Report Type	Created Date	Active	Shared
Students By Roll Group	Students By Roll Group	Current Students	Student Lists	Standard	26/06/2016	✔	🔒

4. From the **Teacher Toolkit | Groups** menu, search for each new Roll Group and check that the correct students are assigned. Click the **More Actions** button and select **Print Group List** if required.

End of Year in Timetabling

Schools using the CES Timetabling module

If the timetable has already been published for the new year, then it must be also be *republished* after the AAY process is complete.

Schools integrating with a different timetabling product

If your school is integrating with a third-party timetabling product, for example, EdVal or Timetabling Solutions, the latest version of the timetable must be sent to CES after the AAY process is complete.

Note: when a timetable is published or imported into CES, the subject enrolments are connected to the enrolment detail records. For example, if the AAY process has not been run in 2022 and the timetable is published/imported for 2023, then the subject enrolments for the 2023 classes will be linked to the 2022 enrolment detail records.

When the AAY process is run in 2022 the system creates the enrolment detail records for 2023. Then when the timetable is republished/reimported, the system decouples the subject enrolment records from the 2022 enrolment detail records and recouples them with the 2023 enrolment detail records.

If this step is not done, then attendance will not be generated.

End of Year in Finance

The end of year in CE Finance consists of four parts: setting up the periods for the new year, completing all processing for the year, completing a month end process and performing an end of year roll over.

The end of year for CE Finance should be done after the new year in order to ensure all transactions have been entered for the previous year.

1. Set up New Year and Periods

The new year and periods will need to be set up in CE Finance before starting the Year End process.

Navigate to **General Ledger | Setup Information | Years and Periods (GZA)**

If the next calendar year has not been generated already:

1. Click Generate
2. The next year to be generated should display in the **Year** field
3. Confirm that **Period 1 Start** is the first day of the first month for the new year
4. Click **OK**
5. Click **Save** and **Exit**

2. Complete All Processing for the Year

Ensure all invoices, receipts, payments, journal entries and adjustments are entered for the year.

3. Complete End of Month Process

The usual End of Month process will need to be completed for December before the Year End process can be started.

1. After completing all processing in all ledgers (including depreciating assets if applicable) post to the GL via GP1
2. Follow the normal End of Month procedure for the month of December. Close all Ledgers. Do not close the General Ledger for December in order for the year end batches to be posted automatically

4. Commence Year End Process

Once all processing and of month for December has been completed, the Year End process can be run.

This process will transfer the Profit & Loss YTD balance to the accumulated funds account and forward the Balance Sheet closing balances as the opening balances for the next year.

This process can be run again if required.

1. Navigate to General Ledger | Year End | Year End Close (GP5)
2. **Run** the year end process for the current fiscal year

Billing End of Year

1. Billing Account Deactivation

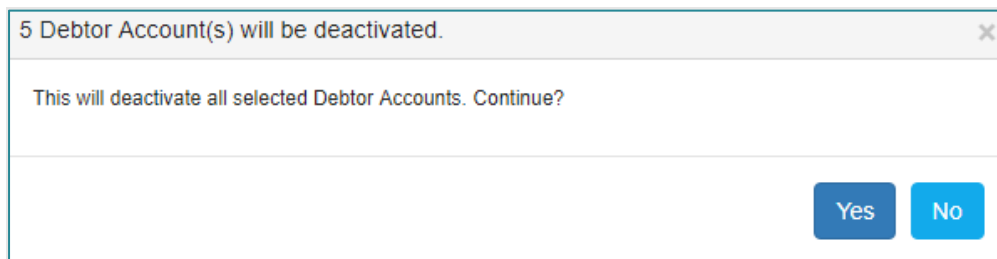
The Billing Account Deactivation menu provides functionality to bulk deactivate Debtor Accounts that no longer need to be used for billing purposes. Accounts will only display on the Account Deactivation page if they no longer have any 'Expected' or 'Current' students attached.

Debtor accounts can be made active again if required at a later date.

If the Debtor account does not have a zero balance, they may still be deactivated in Billing but will remain active in Finance until the balance is cleared. Once the balance of the account is cleared the Debtor account can be flagged as inactive in Finance.

To bulk deactivate Debtor Accounts

1. Navigate to Billing | Debtor Account | Account Deactivation
2. Highlight the Accounts to deactivate (Hint: use <Ctrl> on your keyboard) or click **Select All**
3. Click Deactivate
4. Click **Yes** to confirm



Checklist

Step	Process	Check
End of Year in School Admin		
1.	Check Academic Years	<input type="checkbox"/>
2.	Confirm current year in School Calendar	<input type="checkbox"/>
3.	Confirm next School Calendar year is available	<input type="checkbox"/>
4.	Review Exiting students	<input type="checkbox"/>
5.	Flag Repeating students	<input type="checkbox"/>
6.	Review 'Passive' Students	<input type="checkbox"/>
7.	Review Existing Expected Students	<input type="checkbox"/>
8.	Transfer Future Students (Optional)	<input type="checkbox"/>
9.	Run Advance Academic Year	<input type="checkbox"/>
10.	Future Year Data Check	<input type="checkbox"/>
11.	Assign Roll Groups (Option 1)	<input type="checkbox"/>
12.	Review student status	<input type="checkbox"/>
13.	Transfer 'Historical' students to Past Members (Optional)	<input type="checkbox"/>
14.	Transferring students (Optional-Jurisdiction Schools only)	<input type="checkbox"/>
15.	Set up Payment Due dates in CE Finance	<input type="checkbox"/>
Tasks in the New Year		
16.	Update current calendar	<input type="checkbox"/>
17.	Review Part-Time Students	<input type="checkbox"/>
18.	Assign Roll Groups (Option 2)	<input type="checkbox"/>
19.	Check Roll Groups	<input type="checkbox"/>
End of Year in Timetabling		
1.	Republish/reimport the timetable.	<input type="checkbox"/>
End of Year in Finance		
1.	Create new year and periods	<input type="checkbox"/>
2.	Complete all processing and post to the GL	<input type="checkbox"/>
3.	Complete month end processes	<input type="checkbox"/>
4.	Process Year End (GP5)	<input type="checkbox"/>
Billing		
1.	Deactivate Debtor accounts	<input type="checkbox"/>

Appendix

Configure Global Calendar

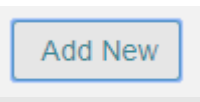
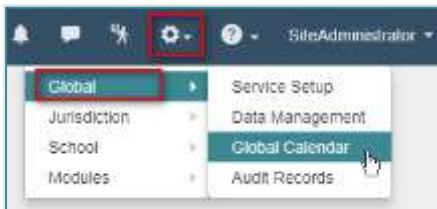
Name	StartDate	EndDate	Last Published Date	Published By
2024-2024	01/01/2024	31/12/2024		
2023-2023	01/01/2023	30/12/2023	29/06/2022 10:01:04	Terri Matheson (Civica)
2022-2022	01/01/2022	31/12/2022	03/02/2022 15:24:25	Terri Matheson (Civica)
2021-2021	01/01/2021	31/12/2021	18/05/2020 12:22:21	Jacqueline Smith
2020-2020	01/01/2020	31/12/2020	14/04/2019 14:56:25	Brenda Daley
2019-2019	01/01/2019	31/12/2019	25/06/2018 10:17:15	Shadi Agtajanian (Civica)

New Global Calendar Setup

The new school calendar year and teaching terms must be set up for the new school year before the AAY process can be run so that the task can pick up the new school year.

Note: When setting up the new calendar all dates entered must be in the future therefore the new year calendar setup must be completed *before* the end of the current calendar year.

1. Access the Global calendar through **Settings | Global | Global Calendar**



2. Click **Add New**
3. Enter the dates for the new school year and click **Save**

Calendar ✕

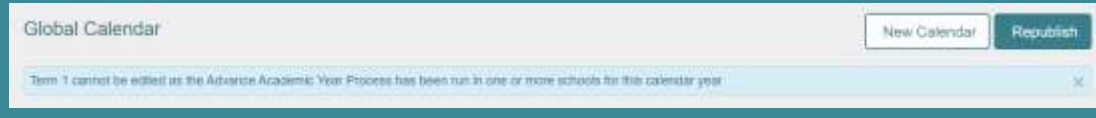
Year From :

Note: Calendar Year dates should always be set up from 1st January to 31st December to ensure student enrolment records can be viewed from 1st Jan in the new year.

4. Enter the **Start** and **End** dates for all terms (see Important Note above).

Note: It is important that the term dates are correctly set before publishing the calendar as there are specific rules associated with re-publishing this information, once the calendar is published.

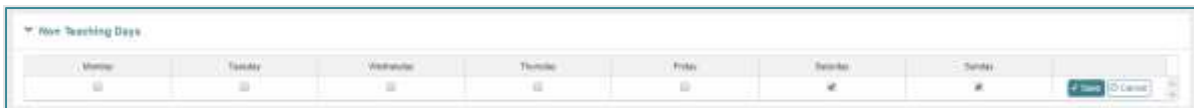
For Jurisdiction schools, if the calendar needs to be republished, and any of the schools have run the Advance Academic Year process for the matching calendar year, then the 'Add New' button for Terms and the 'Delete' and 'Edit' icons may be disabled.



5. Click **Save** for each term.

Term Name	Start Date	End Date		
Term 1	30/01/2023	06/04/2023		
Term 2	24/04/2023	30/06/2023		
Term 3	17/07/2023	22/09/2023		
Term 4	09/10/2023	14/12/2023		

6. Click **Edit** in **Non-Teaching Days**, make selections and click **Save**



7. Enter any **Non-Attendance Days** as required by clicking on **Add New** and completing the details. Click **Save**

New Non Attendance Days ✕

Date From: To:

Day Type: ▼

Description:

All AcademicYears:

Academic Year:

Note: Public Holidays and other Non Attendance Days set up in the Global Calendar, cannot be edited by individual schools once the global calendar is published.

Additional Non Attendance Days days can, however, be added by schools in their School Calendar as required.

8. Click **Publish**. The future calendar is then available at the school level.
9. The future calendar is then available to view at the school level (**Settings | School | School Settings | School Calendar**).

Support

Help Desk: 1300 550 062

Fax: +61 8 6466 2990

Email: educationsupport@civica.com.au

Be prepared to supply your School Name, contact details and a brief description of the problem in your email, fax or phone message.

Your comments are of great value to us in improving our computer systems, publications and services. Any feedback on help desk services would be appreciated to educationsupport@civica.com.au

Document Control:			
Version:	Author:	Date:	Comments:
0.1	Sandy Bracher	04/09/2020	Created document
1.0	Heike Mullee	05/10/2020	Reviewed and updated
2.0	Allison Doubikin	04/12/2020	Further updates
2.1	Omayya Hourani	07/12/2020	Finance updates
2.2	Omayya Hourani	01/02/2021	Finance updates
2.3	Allison Doubikin	06/08/2021	Updated for EOY 2021
2.4	Omayya Hourani	06/08/2021	Finance updates for 2021
2.5	Derek Mathieson	09/08/2021	Reviewed and updated
2.6	Allison Doubikin	11/08/2021	Further updates
2.7	Derek Mathieson	18/11/2021	Update to fix number formatting
3.0	Derek Mathieson	11/11/2022	Updated for EOY 2022

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