

HST FOH Rollover Quick Guide

Pre-Work

1. Pull all relevant reports and store copies. The Roster report of active students is recommended.
2. Check student grades to see if they are in this school year's grade or next year's grade.
If the students are in next year's grade, specify not to promote in the End of Year process.
3. Turn off automatic SIS Import.
4. Update the school calendar at CO and copy it to all applicable sites.
5. Go to **Admin > Schools** and verify that all CEP and Provision II schools are marked correctly.

Note: Provision II schools also need the correct base year.

End of Year Process

1. Go to **Admin > End of Year Process**.
2. Enter the following information:
 - **School Options**
 - **School Starts/School Ends:** Based on the most used calendar for the district.
 - **Configure Alternative Dates:** Enter alternative dates for schools with different start dates.
 - **Student Options**
 - **Promote Students (Grade and School):** Check this check box only if students are not in the new school year grade.
 - **Only Archive Students Who Have Been Inactive For Over 4 Months:** Removes students who have been inactive for more than 4 months from the live data.
 - **Archive All Inactive Students:** Removes all inactive students from the live data.
 - **Adult Options**
 - **Do Not Archive Active Adults:** Ensures that no adults listed as active are removed from the live data.
 - **Archive Active Adults:** Archives active adults who have not had a transaction in a given time frame.
 - **Account Balance Options**
 - **Carry over all balances:** Both positive and negative balances for active students remain after the rollover.
 - **Set NEGATIVE balances to zero:** The rollover erases all negative balances for active students.

Note: To carry over balances for inactive students, call Horizon before completing the rollover.

- **Application Options**

- **Starting Application Number for Next School Year:** Starting point for all application numbers for the new school year.
- **Archive Non-Student Household Members:** Removes non-student household members.
- **Disassociate DC Relationships**

- **Grade and School Promotion**

Verify that the correct promotion grade and promotion sites are set.

3. Access the **Preview** tab to verify the options you selected and compare the numbers.

Note: *Do not process the rollover without thoroughly reviewing these numbers!* A support case must be created if a rollover needs to be re-processed.

4. Click the down arrow next to the **Save** button and click **Complete End of Year**. Wait for processing to finish before closing the window.