Start New Year Instructions

School Year 2016-2017

- Only **iePoint** > Managers can perform the **Start New Year** process.
- Log in as an **iePoint** > Manager with administrative rights to the data folders. Certain features of **Start New Year** cannot be performed without administrative rights.
- Allow ample time (30+ minutes) to complete the process.
- All other users must be out of **iePoint** >.
  Confirm this by going to: **File**->**iePoint** > Manager -> **Session Management**.

Before performing the **Start New Year** process, please view the Demonstration Video on our website at [http://www.hbug.k12.il.us/](http://www.hbug.k12.il.us/) -> [Training & Help] -> [Resource Library] -> [iePoint > Manager] ->[Start New Year] or click the link below to navigate there directly:

[Start New Year]

Beginning the **Start New Year** process:
- In **iePoint** >, go to **File** -> **iePoint** Manager -> **Start New Year**
The following informational box will appear. This explains exactly what will happen during the Start New Year process.

Click **CONTINUE** when ready to begin the Start New Year process.

Update Client Entered SIS Ids? This option will help eliminate SIS Id Mismatches in iepoint > which will benefit data accuracy in I-Star.
If Yes is selected, the option to run detailed SIS ID Reports will be available.

The following success message will appear once the process is complete.

The next three steps are automated. During this time, an exact copy of the DATA2016 folder is created and named DATA2017.

After the first three steps, iePoint > will display:

- How many FACTS records were removed from DATA2017 folder that had current year End Dates.
- How many FACTS records remain in DATA2017 folder.
- How many Enrollment records were removed from DATA2017 folder that had current year Stop Dates.
- How many Enrollment records remain in DATA2017 folder.
Mass Change Facility – Optional

Mass Change allows the user to change a large number of records at one time without touching each record individually. If Mass Change is performed at a later date and not during the Start New Year process, it must be performed in the year created during the Start New Year process (DATA2017).

FACTS Begin Dates in DATA2017

FACTS Begin Dates may be mass changed by Serving District or Resident District.

All appropriate entities marked in ‘LEAs for Lookup’ will appear in the left column.

Move items between columns by performing ONE of the following options:
- Selecting a single district and then clicking the single arrow [>] or
- Double-clicking on a district or
- Clicking the double arrow [>>] to move all districts

Once the district(s) have been selected, enter a Begin Date and click MASS CHANGE DATES.
(Note: This date should be the first day of pupil attendance. Pupil attendance days are denoted as any X days on the calendar.)

Continue this process as needed.
Once all desired district Begin Dates are updated, click << Back.
**Enrollment Start Dates in DATA2017**

*Enrollment Start Dates* may be mass changed by *Class Location* or by *Class*. All appropriate entities marked in ‘LEAs for Lookup’ will appear in the left column.

Move items between columns by performing ONE of the following options:
- Selecting a single class and then clicking the single arrow [>] or
- Double-clicking on a class or
- Clicking the double arrow [>>] to move all classes

Once class(es) have been selected, enter a *Start Date*. Click **MASS CHANGE DATES**.

*(Note: This date should be the first day of pupil attendance. Pupil attendance days are denoted as any X days on the calendar.)*

Continue this process as needed.

Once all desired *Enrollment Start Dates* are updated, click **<< Back**.
**Personnel Begin Dates in DATA2017**

All appropriate entities marked in ‘LEAs for Lookup’ will appear in the left column.

Move items between columns by performing ONE of the following options:
- Selecting a single district and then clicking the single arrow [>] or
- Double-clicking on a district or
- Clicking the double arrow to move all districts [>>]

Once the district(s) have been selected, enter a Begin Date then click **MASS CHANGE DATES**

Continue this process as needed.
Once all desired Begin Dates are updated, click **<< Back** and then **CONTINUE**.
**Remove Records in DATA2017 – Optional**

Select **Student records** to remove from **DATA2017**.

**Students with only General Records**
This option removes students who have a *General* record but do not have *FACTS, Enrollment, Transportation*, or *Event* records. *Very few students will be removed from DATA2017 with this option.*

**Students without FACTS Records**
This option removes students who do not have *FACTS* records in the **DATA2017** folder. This keeps the **DATA2017** folder current but leaves *FACTS* records with end dates in the **DATA2016** folder. Selecting ‘Students without FACTS Data’ will remove a student with *Enrollment, Transportation* or *Event* information.

Click **CONTINUE**.
Select **Personnel records** to remove from *DATA2017 – Optional*

**Personnel with Only General Records**
This option removes personnel who only have a General record.

**Personnel without Approval Records**
This option removes personnel without Approval records.

Click **CONTINUE**.
Zero Reimbursement amounts and Program Definition amounts in *DATA2017– Optional*

This allows you to start with blank salaries, benefits, student reimbursement amounts, and program definition information in the Reimbursement records for *DATA2017*.

When clicking ‘Zero Program Definition Amounts’, you will see a screen with options of what you can do within the program definition.

When you’ve completed this step, click **<< Back** then Click **CONTINUE**.
Include records in **Approval** and **Claim** in *DATA2017* – **Optional**


Click [CONTINUE].

Increment Student **Grade Level** in School Year 2017 - **Optional**

This option increments the ISBE grade level field on the General Page for Students in *DATA2017*. 
If you **do not** want to increment Pre-K, uncheck the box before incrementing grade levels.

**All Tables in DATA2017 will now be re-indexed.**

**Done with School Year 2017…**

**Cleaning up School Year 2016**

The cleanup process will display:
- How many FACTS records were removed from 2016 that had 2017 Begin Dates
- How many FACTS records remain in **DATA2016**

After “Pressing any key…” **iePoint** > will display:
- How many Enrollment records were removed from DATA2016 that had 2017 Start Dates.
- How many Enrollment records remain in **DATA2016**

Select **Student records** to remove from **DATA2016 (Optional)**

This is the same process as the record removal from DATA2017 except it works in the **DATA2016** folder.

**Students with Only General Records**
This option removes students who have a General record but do not have FACTS, Enrollment, Transportation, or Event records.

**Students without FACTS Records**
This option removes students who do not have FACTS records in the **DATA2016** folder.
Selecting ‘Students without FACTS Data’ will remove a student with Enrollment, Transportation or Event information.

Select **Personnel records** to remove from *DATA2016 (Optional)*

This is the same process as the records removal from *DATA2017* except it works in the *DATA2016* folder.

**Personnel with Only General Records**
This option removes personnel who only have a *General* record.

**Personnel without Approval Records**
This option removes personnel without *Approval* records.

All Tables in *DATA2016* will now be re-indexed.

When *Start New Year* is complete, *iePoint > 2016* will exit. *iePoint > 2016* will continue to manage both *DATA2016* and *DATA2017* until *iePoint > 2017* is installed during the fall or I-star is released.

*iePoint > 2016* will continue to open in *DATA2016* until August 18th.