

Year End Activities & Checklist - PA

Updated December 2020

ClassMate Year End Activities & Check List

Your school calendar is based on an annual cycle, or fiscal year, beginning on July 1st and ending on June 30th. During the summer, your school is required to perform an Annual System Rollover of the previous year's data in order to prepare for the new school year. Your school will be required to submit the required data to the State Department of Education based on the appropriate fiscal year; after Annual System Rollover, this data will be available in your ClassMate Archive Database.

This document addresses the activities that must take place **PRIOR** to your system upgrade and system rollover. Following the steps outlined below will help you prepare your data in an organized and systematic manner. Due to the ever-changing PIMS reporting requirements the process may have changed so please review all documents carefully.

| May – June PART A | June- July- August PART B | August- September PART C |
|--|---|--|
| Work on Returning & New Student Projections | Perform Audit – Year End Filing of Reports **MUST occur BEFORE System Rollover is Performed | Continue Base Data & Curriculum Changes |
| PIMS CTE Submission Window: June - July | Annual System Rollover **Activity MUST be Scheduled with ClassMate | Final New Year Scheduling |
| PIMS Safe Schools Submission Window: May – July | Base Data & Curriculum Changes **After System Rollover is performed*** | New Staff Inductions And In-Service Training |
| PIMS Child Accounting Submission Window: June – August | New Year Enrollment | School Year Opens |

To ensure data integrity, prior to archiving your end of school year information, the activities listed on the following page MUST be completed & confirmed in order for ClassMate to complete your sites Annual Rollover.

Once a category has been completed please confirm by using the checkbox next to the completed item.

All year end activities MUST be completed, at least 2 days, prior to your scheduled date to facilitate rollover.

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END OF YEAR ACTIVITIES CONFIRMATION CHECKOFF

Once ALL recommended categories have been reviewed, adjusted, reports printed/saved/filed please sign and date below and forward this page along with your completed Roles & Responsibilities and requested PIMS submission completion screen shots to ctesupport@harriscomputer.com

Once this document & confirmation screen shots are received, a ClassMate Representative will confirm your site(s) ready for your Year End Rollover with our Engineers.

The date your Rollover is scheduled for will require all users to be logged out of the ClassMate system for the entire day in order to complete all steps necessary.

- | | |
|---|---|
| <u>1. Data Validations</u> | COMPLETED <input type="checkbox"/> |
| <u>2. Finalize All Student Projections</u> | COMPLETED <input type="checkbox"/> |
| <u>3. PIMS Safe Schools Reporting</u> | COMPLETED <input type="checkbox"/> |
| <u>4. PIMS Child Accounting Reporting</u> | COMPLETED <input type="checkbox"/> |
| <u>5. PIMS CTE (Summer) Reporting</u> | COMPLETED <input type="checkbox"/> |
| <u>6. Export ALL PIMS Templates</u> | COMPLETED <input type="checkbox"/> |
| <u>7. Perkins Data Reporting</u> | COMPLETED <input type="checkbox"/> |
| <u>8. Audit – Year End Filing</u> | COMPLETED <input type="checkbox"/> |
| <u>9. Attach PIMS Submission confirmation</u> (See sample screenshot for C4, C5 & C6) | COMPLETED <input type="checkbox"/> |
| <u>10. Roles & Responsibilities</u> | COMPLETED <input type="checkbox"/> |

Signature

Date

Location (s)

Next School Year 1st Student Day

***** After system RollOver is completed and BEFORE your New School Year begins **
Review & perform any necessary system changes using the After-Rollover ClassMate
Modifications/Updates Checklist to prepare for your New School Year***

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1. Data Validations

The data validations list below should be familiar, as it is a ClassMate best practice to perform these validations prior to each PIMS submission. The following data validation categories must be run and any outstanding data validation exceptions **MUST** be eliminated.

Each validation report has the instructions, at the top, on how to review/resolve the data that appears on the report. You can also review the Data Validations Glossary v2018a document that provides additional detail on each validation that could be encountered.

The Data Validations can be found in the **Modules > Student Enrollment > ClassMate Data Validations**

Run each process by category and then resolve any data issues as indicated.

- Enrollment/Projection
- Attendance
- Grading
- Discipline
- Special Populations
- Base Data
- Miscellaneous
- ODR

2. Finalize All Student Projections

All student projections for new & returning students must be complete and finalized. This is a **MANDATORY** step.

Any underclassman that will not be returning next year need to be handled as a withdrawal using an appropriate Year End Status Code.

The Projections modules for both new and returning students can be found in the **Student Projection Category**

- Projections
 - **New Students**
 - Enter and project all new students attending school next year. New student projection module can be found under **Modules > Student Projection > New Student Projection/Enrollment**
 - **Returning Students**
 - Project all returning students attending school next year. **Return Student Projection/Enroll and Return Student Course Change** modules can be found under **Modules > Student Projection Category**
 - Withdraw juniors (or underclassmen) with a “**Withdrawn from CTE**” program status and “**W-#**” code. Codes can be entered under **Modules > Student Enrollment > Student Scheduling**.

For more detailed instructions concerning Projections please review the ClassMate Documentation “Introduction to Enrollment Projections” found on the ClassMate website <http://www.classmate.net/>, under Documentation – Classmate CTE Documentation – Student Projection.

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****Additional Activity****

PRIOR to rollover all seniors who will NOT be accepting a diploma and will continue to attend the CTC until the age of 21, **MUST** have their student type changed to a **UGC** (Un-graduated Continuing Student). The student type can be updated in:

Student Enrollment > Student Master > Student Information Tab > Student Type

Their grade level remains 12th grade. During rollover, these students are rolled up to 13TH, 14TH, 15TH and 16TH grade level automatically.

****If you have current 13th, 14th, 15th, 16th graders that are NOT returning you will need to change their Current Grade back to 12th and their Student Type back to HS in order for the system to roll them out during the process.****

3. PIMS Safe Schools Reporting

Career and Technology centers are required to submit data on student discipline, specifically addressing incidents related to violence and weapons possession. In addition, Safe School legislation requires schools to collect and submit data on the volume of student truancy and frequency of out-of-school suspensions.

For more detailed instructions concerning the PIMS Safe Schools Data Entry please review the **PIMS Safe Schools Reporting** Documentation, found on our website under Pennsylvania documentation:

<http://www.classmate.net/classmate-user-state-documentation/>

Mandatory Step: Print out or PDF a copy of the reports listed below. These reports provide a summary of student infractions and are NOT available in this format after rollover.

Only individual student referral histories will be available from archived data.

ClassMate also recommends exporting these reports to PDF's and saving the PDF's somewhere other than the M: drive so that these reports can be re-printed if necessary.

- Additionally, make sure ALL PIMS Safe Schools templates are exported, submitted, and the .csv files used for the final approved submission are moved out of the PIMS folder located on your M drive in the ClassMate folder.
 - **Student**
 - **Staff** (submitted only if site DOES directly employ or contract school security staff)
 - **Staff Snapshot**
 - **Staff Development Fact** (submitted only if site DOES directly employ or contract school security staff)
 - **Staff Assignment** (submitted only if site DOES directly employ or contract school security staff)
 - **Discipline Domain Templates**
 - Incident
 - Incident Victim
 - Incident Offender
 - Incident Offender Infraction
 - Incident Offender Infraction Weapon
 - Incident Offender Disciplinary Action
 - Incident Offender Parental Involvement
 - Person
 - Location Fact
 - District Fact (only submitted if your site does NOT have any directly employed or contracted school security staff)

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Print out and/or PDF the below recommended reports

- **PIMS Safe School Reports** (After PIMS Safe Schools submission)
 - Under Reports > Administrative Discipline Category:
 - **Discipline Incident Information Report**
 - **Discipline Statistics by Course**
 - **Discipline Statistics by Discipline**
 - **Discipline Statistics by School**
 - Under Reports > State Reporting Category:
 - **Safe Schools Offender Report** – You must export your Safe School related templates before running this report.
 - **Safe Schools Victim Report** - You must export your Safe School related templates before running this report.
 - **Safe Schools OSS (Out of School Suspension) Details**
 - **Safe Schools OSS (Out of School Suspension) Totals**
 - **Safe Schools Truancy Details** – If Truancy is applicable to your site
 - **Safe Schools Truancy Reports** – If Truancy is applicable to your site
 - **Safe Schools Truancy Summary** – If Truancy is applicable to your site
 - **PDE-360 Violence & Weapon Possession**
 - Under Reports > PIMS Management Category:
 - **Current Yr – Location Fact Report** - You must export your Safe School related templates before running this report.
- **PIMS Course Reports**
 - Under Reports > PIMS Management Category:
 - **PIMS Course, Enrollment & Instructor Reports**
- **PIMS Employee Reports – Run only IF your site uses ClassMate to submit the employee templates to PIMS.** (If your HR Department submits this information you may disregard this section.)
 - Under Reports > PIMS Management Category:
 - **Alpha Employee PIMS Report** - You must export your staff, staff snapshot and staff assignment files before running this report. Make sure to select the correct Submission Date when creating the export files.
 - **Alpha Employee PIMS – Confidential** - You must export your staff, staff snapshot and staff assignment files before running this report. Make sure to select the correct Submission Date when creating the export files.
 - **Alpha Employee Assignment Report** - You must export your staff, staff snapshot and staff assignment files before running this report. Make sure to select the correct Submission Date when creating the export files.
 - **Current Yr Alpha Staff/Staff Assignment Report** - You must export your staff, staff snapshot and staff assignment files before running this report. Make sure to select the correct Submission Date when creating the export files.
 - **Prior Yr Alpha Staff/Staff Assignment Report** - This is the data currently in your Prior Yr State Reporting Module, this is last school year's data. If you are in your 1st year of using ClassMate you will be unable to run this report.

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4. PIMS Child Accounting Reporting

Child Accounting Reports should be sent to the districts for reconciliation quarterly. Reconcile any differences with the districts and request sign off from each district (prior to rollover, if possible.)

The Enrollment Membership Summary Report can be found under **District Billing > Enrollment Membership Summary**.

Please make sure to print copies of this report. ClassMate also recommends that you export this report as a PDF and save it somewhere other than the M: drive for possible future re-print.

For more detailed instructions concerning the PIMS Child Accounting submission please review the **PIMS Collection 5 Child Accounting** Documentation. This is found on the ClassMate website under Pennsylvania documentation: <http://www.classmate.net/classmate-user-state-documentation/>

- Additionally, make sure ALL PIMS Collection 5 Child Accounting templates are exported, submitted, and the .csv files used for the final approved submission are moved out of the PIMS folder located on your M drive in the ClassMate folder.
 - **Student**
 - **School Enrollment**
 - **School Calendar**
 - **Student Calendar Fact**

Print out and/or PDF the below recommended reports

* Under Reports > PIMS Management Category:

- **Alpha Cte Student Calendar Fact – Current Yr** – You must export your PIMS Student Calendar Fact template before running this report
- **Alpha Membership PIMS/CAD Crosswalk** – You must export your PIMS Student Calendar Fact & PIMS School Calendar templates before running this report.
- **Alpha PIMS Student Details** – You must export your Student template before running this report
- **Current Yr – School Calendar Report** – You must export your PIMS School Calendar template before running this report.
- **PIMS ADM Summary (compare with Enrollment Membership Summary report under District Billing)**
- **Prior Yr – ADM Summary**
- **Prior Yr – Alpha PIMS Student** - This is the data currently in your Prior Yr State Reporting Module, this is last school year's data. If you are in your 1st year of using ClassMate you will be unable to run this report.
- **Prior Yr – PIMS Student Calendar** - This is the data currently in your Prior Yr State Reporting Module, this is last school year's data. If you are in your 1st year of using ClassMate you will be unable to run this report.
- **Prior Yr – PIMS School Calendar** - This is the data currently in your Prior Yr State Reporting Module, this is last school year's data. If you are in your 1st year of using ClassMate you will be unable to run this report.

* Under Reports > District Billing Category:

- **Enrollment Membership Summary**
- **Instructional Time Summary**
- **Student School Schedules**
- **Time Summary Assignment**

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- **Sending School Time Schedules (located under Base Data Information category)**

Please make sure to print copies of these reports. ClassMate also recommends that you export these reports as a PDF and save somewhere other than the M: drive for possible future re-print.

5. PIMS CTE (Summer) Reporting

CTE data reporting requirements have been incorporated into the PDE PIMS reporting process. However, you are still required to collect and enter certain data into ClassMate.

The four key data components include: Work Based Learning, Industry Certification, Technical Hours and Year-End Completion Status.

For more detailed instructions concerning the PIMS CTE (Summer) submission please review the **PIMS Collection 4 CTE (Summer) Submission** Documentation. This is found on the ClassMate website under Pennsylvania documentation: <http://www.classmate.net/classmate-user-state-documentation/>

- Additionally, make sure ALL PIMS Collection 4 CTE templates are exported, submitted, and the .csv files used for the final approved submission are moved out of the PIMS folder located on your M drive in the ClassMate folder.
 - **Student**
 - **Student Snapshot**
 - **School Enrollment**
 - **CTE Student Fact**
 - **CTE Student Industry Credentials**
 - **Programs Fact (if applicable for your site)**

Print out and/or PDF the below recommended reports:

* Under Reports > PIMS Management Category:

- **Student Technical Hours Report**
- **ClassMate – PIMS Verification Report**
- **Alpha PIMS Snapshot Details**
- **Alpha PIMS Student Details**
- **Current Yr CTE Student Credentials** – You must export your CTE Student Credentials template before running this report
- **Alpha CTE Student Fact – Current Yr** – You must export your CTE Student Fact template before running this report
- **PIMS Program Fact Report** – If applicable for your site. You must export your Program Fact template before running this report. (if your site does not submit Program Fact during PIMS submission this will be blank)
- **Alpha PIMS School Enrollment** – You must export your School Enrollment template before running this report.
- **Prior Yr – CTE Student Fact** – This is the data currently in your Prior Yr State Reporting Module, this is last school year's data. If you are in your 1st year of using ClassMate you will be unable to run this report.
- **Prior Yr – CTE Student Credentials** – This is the data currently in your Prior Yr State Reporting Module, this is last school year's data. If you are in your 1st year of using ClassMate you will be unable to run this report.
- **Prior Yr – Technical Student Hours** - This is the data currently in your Prior Yr State Reporting Module, this is last school year's data. If you are in your 1st year of using ClassMate you will be unable to run this report

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Please make sure to print copies of these reports. ClassMate also recommends that you export these reports as a PDF and save somewhere other than the M: drive for possible future re-print.

6. Export ALL PIMS Templates

*** VERY IMPORTANT * if you are a Multi-Location site please remember to select to export for “COMBINED locations” for ALL templates prior to RollOver**

The night before or the morning of System Rollover you **MUST** export ALL PIMS templates one final time. Make sure you export the templates using the most recent & valid submission dates for each template. This process is **NECESSARY** as these PIMS templates will be used to populate your Prior Year State Reporting module which is the module you will use AFTER System Rollover should you need to edit and/or re-submit any PIMS data.

When exporting Safe Schools templates one final time before rollover remember to export as a “Combined Location”. This will store your Safe Schools file with all location data before rollover so that all locations roll to archive correctly. During the individual exports, the tables are purged and only one location data is inserted.

7. Perkins Data Reporting

- Student data information required for justification of Perkins funding, should be generated from the software via available reports that itemize special populations.
- Review all Special Populations for IEP Students
- Make sure to print out or PDF the **Perkins PDE-4686-B Information report found under Reports > Special Populations**
 - This report **MUST** be printed **BEFORE** System Rollover which is typically performed in July/August.
 - **ClassMate highly recommends exporting these reports to PDF's and saving the PDF's so that these reports can be re-printed if necessary. Please save locally as opposed to on the M: drive.**
- Print out and/or PDF any other Special Population reports for local use as determined necessary by your school.

8. Audit – Year End Filing

Below are our recommendations of important reports that should be printed, exported as PDF's & saved on file somewhere other than the M: drive. Sites with multiple locations should print & export as PDF's the reports listed before for each location.

- **State Reporting recommended reports** – generate and export / save as PDF as there currently is no archive version of these reports and the data might not be extractable after RollOver
 - **Statewide Articulation**
 - **339 Student Transcript**

9. PIMS Submission Confirmation – Example Screen Shots

| <input type="checkbox"/> | BATCH ID | COMMENTS | MODIFIED TIME | BATCH STATUS | DATA STAT |
|--------------------------|----------|---|------------------|--------------|-----------|
| <input type="checkbox"/> | 832668 | AED 1617 Upload | 2017-07-25 12:51 | Complete | |
| <input type="checkbox"/> | 832497 | C5 Child Accounting 1617 Submission Try ... | 2017-07-25 10:33 | Complete | |
| <input type="checkbox"/> | 832007 | C4 CTE Adult 1617 Submission | 2017-07-24 11:06 | Complete | |
| <input type="checkbox"/> | 831567 | C4 CTE 1617 Submission Try 1 | 2017-07-21 14:30 | Complete | |
| <input type="checkbox"/> | 831480 | Student Updates 1617 | 2017-07-21 10:22 | Complete | |
| <input type="checkbox"/> | 822457 | | 2017-06-20 09:29 | Complete | |
| <input type="checkbox"/> | 819779 | Fire Drill Upload 1617 | 2017-06-07 10:08 | Complete | |
| <input type="checkbox"/> | 814455 | Bus - 201617 Collection | 2017-05-04 08:33 | Complete | |

or you can submit each individual collections screen shot as shown below for C6 Safe Schools – if you do this you can put all submission screen shots on 1 document or attach individually

| BATCH DETAILS - DATA QUALITY ENGINE | |
|-------------------------------------|-------------------------|
| BATCH ID: | 829569 |
| AUTO BATCHED: | No |
| LAST MODIFIED: | 2017-07-19 |
| DATA COLLECTION: | C6 Safe Schools 2016-17 |
| BATCH STATUS: | Complete |
| DATA STATUS: | |
| DATA EXCEPTION STATUS: | N/A |
| DATA EXCEPTION REQUESTER COMMENTS: | N/A |
| DATA EXCEPTION DECISION COMMENTS: | N/A |
| COMMENTS: | Safe Schools #1 |

Generating and retaining ClassMate Reports and other exports

It is a ClassMate best practice/recommendation to generate and print, save to PDF, or both, any reports you feel you may need to refer to later for any reason, especially those that contain data that is not retrievable via any currently available reports in the “Archive Reports” category.

While you may wish to leave a copy of these PDF’s on your M: drive for easy access, it is strongly advised to also store them in some other data location on your internal network.

Each customer should develop its own list of required reports to retain in this manner, as it will vary based on various factors for each. Some typical examples would be reports with attendance data, grades, report cards and/or progress reports, discipline data, state reporting data, and so on.

There may also be specific exports a site may wish to generate and retain from the [Data Export Wizard module](#).