

Harmony3

End of Year Procedures Checklist

_____ **Update all attendance in Harmony.** All attendance will archive in Harmony and you will be able to access it next year. Make sure it is accurate for every student for state reporting. **Verify the list of students with 10 or more unexcused absences (these students will be flagged with a warning on the final DOE-AT report)**

Harmony Tip: Use the Attendance Filter to review all unexcused absences. Select Absent and Unexcused as type, select blank as the reason. This will give you a list of all students with unexcused absences. Work from this list to update absences before the AT report is created.

Use the Attendance Review feature to see the list of students with 10 or more absences.
[H3 Attendance Review Instructions](#)

_____ **Update the Calendar days off.** Make sure all days off are included in the list. The days listed here will determine the 180 school days for the DOE-AT report.

_____ **Update all discipline in Harmony.** Make sure all fields contain the appropriate information (Infraction and Action). If you have any students that were suspended and/or expelled this year, make sure all of the discipline is entered accurately in Harmony for state reporting.

Harmony Tip: Use the State Reports, DOE-ES report view to see the list of students with suspensions and expulsion records.

[H3 Expulsion Instructions](#)
[H3 Suspension Instructions](#)

_____ **Verify that all student grades/report cards/transcripts are accurate.** Mark classes that were taken for Dual Credit. Print Permanent Records and place in Perm record folder. Print the Snapshot in H3. Attendance is on the Harmony permanent record but tardies do not print. All of these can be saved as electronic documents. Upload all transcripts to Parchment after assigning dual credit, grad date and class rank/gpa.

[H3 Report Card Instructions](#) – This link includes instructions for checking grade book preferences, open grade books, marking promoted/retained on report cards, etc.

[H3 Assigning Dual Credit](#)

[H3 Marking a Student as Graduated](#)

_____ **Check the Cohort Report**

Check the ECA status of anticipated graduates

10th grade cohort

9th grade cohort-after set from pupil enrollment date

Check the status of the students on 10/1 that didn't graduate on time

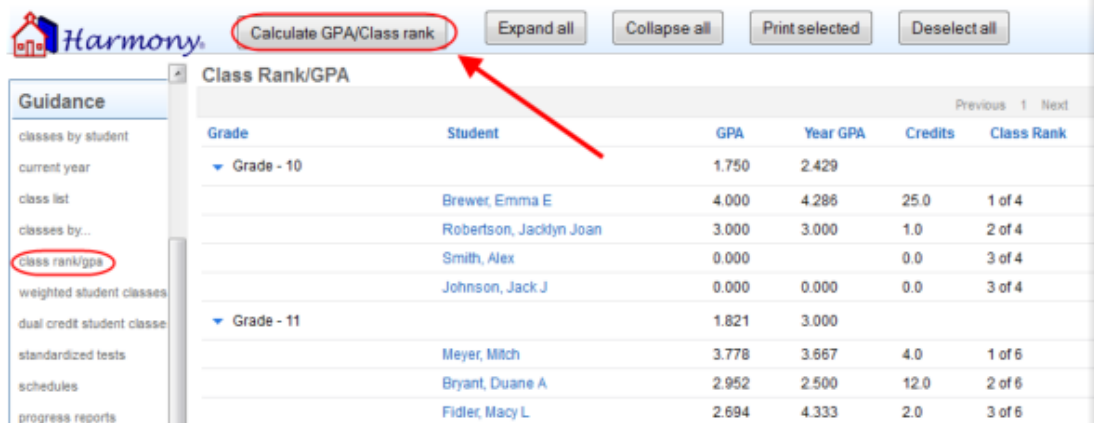
_____ **Create the Honor Roll, Class Rank/GPA, Perfect Attendance reports.** Save a copy of these documents.

[H3 Honor Roll](#)

[H3 Class Rank/GPA](#)

CLASS RANK/GPA

Before transcripts are run, class rank/gpa can be rerun in the Guidance...Class Rank/GPA view. This really only needs to be rerun at the end of a term or after grade history is added to students. To rerun the rank/gpa, click the "Calculate GPA/class rank" button at the top of the screen.



The screenshot shows the Harmony software interface. At the top, there are several buttons: "Calculate GPA/Class rank" (circled in red), "Expand all", "Collapse all", "Print selected", and "Deselect all". Below the buttons is a sidebar with a "Guidance" menu. The "Class Rank/GPA" option in the sidebar is circled in red. The main content area displays a table titled "Class Rank/GPA" with columns for "Grade", "Student", "GPA", "Year GPA", "Credits", and "Class Rank". The table is divided into sections for "Grade - 10" and "Grade - 11".

Grade	Student	GPA	Year GPA	Credits	Class Rank
Grade - 10					
	Brewer, Emma E	4.000	4.286	25.0	1 of 4
	Robertson, Jacklyn Joan	3.000	3.000	1.0	2 of 4
	Smith, Alex	0.000	0.000	0.0	3 of 4
	Johnson, Jack J	0.000	0.000	0.0	3 of 4
Grade - 11					
	Meyer, Mitch	3.778	3.667	4.0	1 of 6
	Bryant, Duane A	2.952	2.500	12.0	2 of 6
	Fidler, Macy L	2.694	4.333	2.0	3 of 6

In this view, you can click on any student's name to see a breakdown of their GPA by each school year and the cumulative GPA at the end of each school year.

[H3 Perfect Attendance](#)

_____ **Run ECA Eligibility Reports.** Keep a record of this report for Fall. This view will clear at rollover.

[H3 Student ECA](#)

_____ **Print a list of all students that are being retained or assigned.** Students...Main and in the Harmony Office Use tab, check the box for Retained for each of these students.

Harmony Tip: Go to Office Use...More Student Views...Retained. Verify these are the students that are being retained this year.

_____ **Move students for scheduling.** Don't forget to move students that are in primary school to the next school. Move Elementary students to the Intermediate database. Move any students that are moving to the next building in your corporation. This needs to be done before Rollover.

_____ **Withdraw all foreign exchange students prior to rollover.** Use the exit code of 27 and the last day of school as the exit date.

<p>27 = Foreign exchange student who returns to country of origin A student who attended a school through a foreign exchange program and left to return to the student's home county should be reported as Foreign Exchange. IMPORTANT: Please make sure to exit such a student <u>at the end of the school year</u>. Schools should maintain the following documentation:</p> <ul style="list-style-type: none">• A signed, foreign exchange program agreement for the student.
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_____ **Run ALL state reports.** Verify that all schools have submitted all state reports before rollover.

_____ **Turn off access to Family Access and Push Notifications in Web Profile for each building.**

_____ **ROLLOVER PROCEDURE.** Who is in charge of the rollover process? What date will Rollover be done?

- _____ Student Management Rollover
- _____ Health Records Rollover
- _____ Café Rollover
- _____ ECA Accounts Rollover
- _____ Library Rollover

[H3 Rollover to the New Year HS/MS](#)
[H3 Rollover to New Year - Elementary](#)

_____ **New teachers to your building,** room number, grade level for elementary or classes at MS/HS. **Teacher name changes** (Notify the technology staff) **When new teachers are added to the database make sure all new and existing staff members have an ID. This will export their staff document to SchoolMessenger, Canvas, etc. Teachers must use their SPN as ID. Staff members can use their payroll ID. Look up all new teachers in the STN Application Center, SPN Lookup. Must use their legal name as it appears on their license.**

_____ **List of any faculty/staff members that are not returning.** Do not remove staff from your database due to evaluation ratings, etc. (Notify the technology staff)

_____ **List of all teachers that are changing rooms, grade level or buildings.** Also, include teachers that are being "shared" with other buildings. (Notify the technology staff)

_____ **List of all students next year Homeroom assignments.**

_____ **Verify ADM counts.** Print a list of all cash transfers that will not be in your building next year. i.e., 5th grade to MS, and 8th grade to HS. The building numbers will need to be updated on their demographics after rollover so they are accurate for state reporting in the fall.

Harmony Tip: Go to Office use, all students, ADM

_____ **Determine what data you wish to clear for the upcoming year.**

i.e., Paperwork. Direct Certification

Harmony Tip: Go to Office Use...More Student Views...Rollover Fields, Paperwork or Registration forms

_____ **Enter template documents that need to be added to Online Registration.** (i.e., Title I form, drug testing policy, any paperwork that is signed yearly)

[Creating Online Registration forms for Family Access](#)

_____ **Textbook rental data for next year.**

Guidance office should contact treasurer with new course offerings.

Balances carried over to next year? (Not F/R balances)

Enter new book fees.

[H3 Textbook Rental](#)

_____ **Save a list of your Direct Certification students.**

_____ Determine who will do the Direct Certification process after Rollover for the upcoming school year. Make sure that café rollover has been completed before importing the new school year direct certification data.

[Harmony3](#)

[Beginning of Year Procedures Checklist](#)

_____ **Verify the System Profile settings.** Is the proper school year data entered? Check the beginning and ending dates of the school year and grading periods. If there are any administrative changes, make sure the Disciplinarian, etc. is correct. **Update the TBR Profile with the correct amounts and settings for this school year. New grading scales or honor roll? Add new scales or change the honor roll criteria.**

_____ **Verify the staff list for each building.** Contact the technology staff if you need personnel added/removed. For elementary teachers, verify the grade level on the staff document as this is tied to subjects created. Once staff documents are created, DO NOT change personnel names. Contact the technology staff or Harmony Support. Make sure all staff members have an ID. This will export their staff document to SchoolMessenger, Canvas, etc. Teachers must use their SPN as ID. Staff members can use their payroll ID.

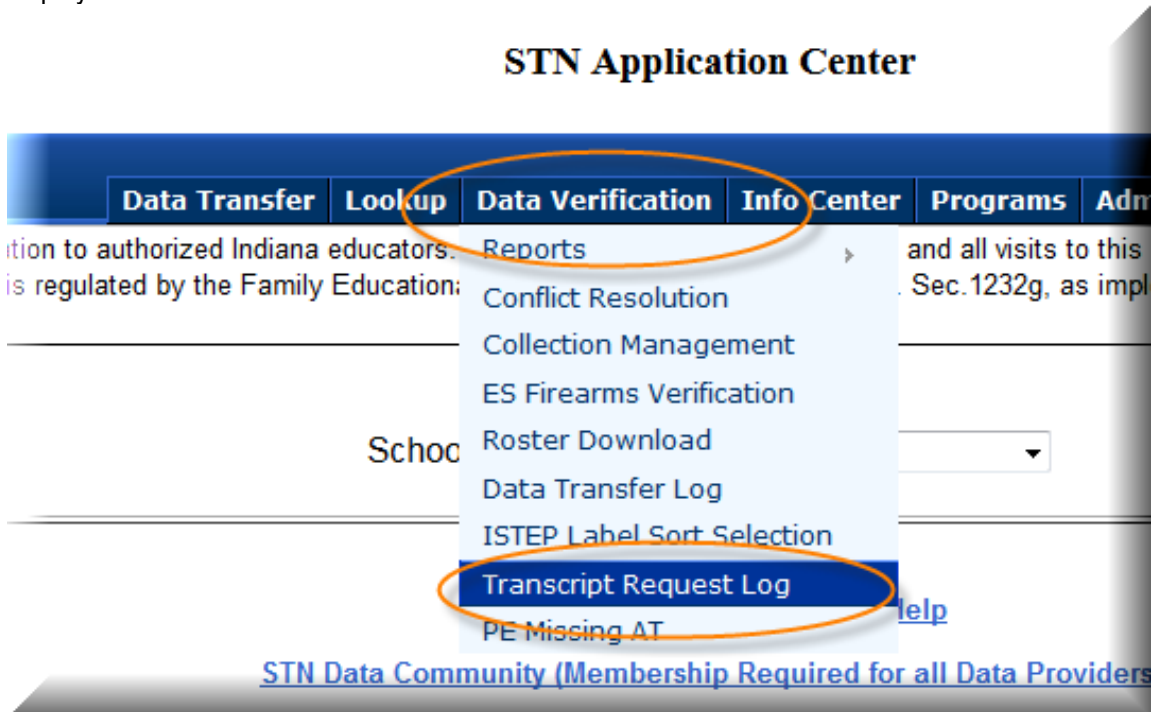
_____ **Enter Calendar Days.** Labor Day, Fall Break, Thanksgiving, Winter Break, etc.

[Calendar Events and Days Off](#)

_____ **Verify the students by grade.** Especially check your PreK and KG students.

_____ **Students that withdraw over the summer will have a withdrawal date of the first day of school for the new school year.**

STN Application Center Tip: Go to Data Verification, Transcript Request Log. This view will display students that have enrolled at a new school in the state of Indiana.



_____ **Enroll new students. ALL students must be searched via the STN Application Center. Verify student's STN, FN, MN, LN, DOB, Race, Language and Grade level.** Enter the data in Harmony. Enter a checkmark in the Office Use section of the student demographic, registration forms, for home language and race/ethnicity. This will mark those forms as complete for online registration. **If a new student enrolls and begins on the first day of school there is no need for a new enrollment date. If you track new enrollments then enter with an enrollment date for the first day of school.**

[New Students H3](#)

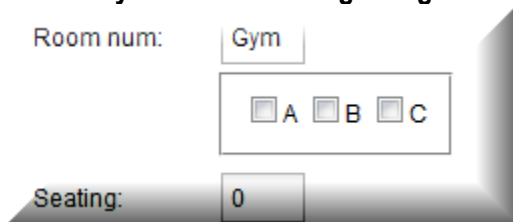
[Re-enrolling Students H3](#)

_____ **Assign students to homerooms, counselors, disciplinarian, etc.**

[H3 Assigning Homeroom Instructions](#)

_____ **Assign lunch to students. This will appear on their schedules.**

Guidance, Classes by Period, Select the period and then indicate the lunch for this class. Mark only Term 1 at the beginning of the year.



Room num:

A B C

Seating:

_____ **Assign Lockers. After Rollover make sure the combination setting is changed on the system profile.**

Determine if locker assignments need to roll or if you issue new assignments

_____ Will students be assigned a new locker?

_____ Will students be assigned a new combination?

[H3 Assigning Lockers](#)

_____ **Assign students to Extra Curricular Activities**

[Student ECA H3](#)

_____ **Elementary Teacher Subjects.** Meet with teachers and determine the names of the subjects for the new school year. ****If prior year lesson plans are going to be used the subject names must be the same as last year.**

Please contact support if you need assistance with creating teacher's subjects for them in H2.

[H3 Elementary Subjects Office Setup](#)

[H3 Elementary Subjects Teacher Setup](#)

_____ **Verify data views in Office Use, More Student Views.**

_____ **All New Enrollments.** Verify students have the correct grade level and enrollment date.

_____ **All Withdrawals.** Verify students have the correct date.

_____ **Guardian Emails**

Harmony tip: Check guardians, addresses, phone numbers for all students by using the Students by Family.

_____ **Check addresses, phone numbers**

_____ **Create Textbook Rental Statements.** Update TBR Profile and System Profile first.

Office Use, System settings, TBR Profile and System Profile

_____ Turn on Family Access (Web Profile)

Questions? Contact support@logickey.com 317-704-7215 (8:00 a.m. – 4:30 p.m. M-F)