

# Skyward Year-End Planning Checklist

*Pro tip: Use this basic outline and add tasks specific to your district. Ask stakeholders to note helpful tasks as the year progresses and incorporate them into a living document.*

## Pre-Year End Preparation

(9+ weeks before year end)

1. Read over Student Management Year End in SkyDoc.
  - a. Log in and navigate to [WS → OF → YE]
  - b. Peruse each guide to get a sense of the process
  - c. Read any state-specific instructions
2. Choose a date to process year end in Skyward
  - a. The system will be LOCKED during this process, for up to 3 days
  - b. Poll all stakeholders to decide on a good time frame
  - c. Choose a time after graduation (Note: Different entities may have different graduation dates!)
  - d. Choose a time before summer school
    - i. Alternatively, create an additional entity for summer school which will be excluded from year-end processing
  - e. Notify stakeholders of the chosen date
  - f. Request 3<sup>rd</sup> party data backups (Note: give a few days' notice, since backups may take hours)
3. Complete pre-year end planning checklists in SkyDoc
  - a. [Quick link](#)
  - b. Include any specific tasks for your district listed here:
    - i. \_\_\_\_\_
    - ii. \_\_\_\_\_
    - iii. \_\_\_\_\_
    - iv. \_\_\_\_\_
    - v. \_\_\_\_\_
4. Run the pre-year end validation wizard.
  - a. Correct errors
  - b. Repeat as needed
5. Send reminders to stakeholders about year-end processing deadlines.
  - a. Notification 2 weeks out
  - b. Notification 1 week out
  - c. Notification 2 days out

## Running Year-End Process

Date: \_\_\_\_\_

1. Check log-in history and ensure all users are logged out of the system.
2. Read over and begin year-end process checklist in Skydoc
  - a. [Quick link](#)
3. After locking out the system, before you leave for the day:
  - a. Have a contingency plan in place—Skyward CANNOT “hack in” to a locked system!
4. While the system is locked:
  - a. Read June release notes
  - b. Review security changes
  - c. Empty sent items and do other clerical housekeeping
  - d. Read over post-year end checklists
    - i. [Quick link](#)

## Post-Year End Review and Planning

(Day after + weeks following)

1. Day after year-end processing:
  - a. Unlock the system
  - b. Update user credentials and destroy contingency note
  - c. Follow post-year end checklist in SkyDoc (quick link above)
    - i. Run validation reports
    - ii. Clean up any errors
  - d. Review specific post-year end processes for your district listed here:
    - i. \_\_\_\_\_
    - ii. \_\_\_\_\_
    - iii. \_\_\_\_\_
    - iv. \_\_\_\_\_
    - v. \_\_\_\_\_
2. Plan for the first day of school
  - a. [Quick link to first day checklist](#)