



Aeries Hosted New Year Rollover Checklist

Please have the following dates available for your NYR planning call.

- **Important Dates**

- Last day of the current school year
- First day of the upcoming school year
- Date to re-open parent/student portal (if not at the time of rollover)
- Date to re-open teacher portal (if not at the time of rollover)

- **Summer School**

Is the district running summer school in Aeries?

If so, please indicate the school code for each school along with the following dates:

- Term 1 start date
- Term 1 end date
- Term 2 start date (if applicable)
- Term 2 end date (if applicable)

Third Party programs that will be used during summer school. Please note that you will need to coordinate with each vendor to ensure timely functionality.

- **Data Confirmation**

Will the district be running Data Confirmation during the summer? If so, provide the following information:

- Date when the data confirmation opens (or opened)

"Do NOT close AUT if Status Date is After" date - Will not close authorization records that have been updated in the latest data confirmation window (or after specified date). For more information about the parent data confirmation process, see our knowledge base articles located here: [Data Confirmation](#)



• New School and Grade Level Changes

If the district will be opening a new school next year, add the new school record (LOC) in the current school year and set the grade range appropriately (LOC.LO, LOC.HI).

If a school will be changing the grade levels that are available and being taught, do one of the following:

- If a grade level is being added (i.e. K-5 becoming K-6), change the appropriate grade level in the current school year.
- If a grade level is being removed (i.e. 7-12 becoming 9-12), change the appropriate grade level in the new school year (after rollover).

• Next Grade and School Fields

Populate ALL next grade (STU.NG) and next school (STU.NS) fields for all students.

- By default, inactive students will be copied to the inactive school regardless of next school value.
- Also by default, pre-enrolled students will remain in the school they are pre-enrolled in regardless of their next school value.
- Students with a next grade value of the highest grade plus one will not rollover. For example, in a K-12 school district, students with a next grade of 13 will not rollover. Likewise, in a K-8 district, students with a next grade of 9 will not rollover.

• Optional Data Rollover

The following can optionally be rolled over into the new year. Please indicate what data you would like to rollover, or if it can remain in the prior year.

- Master Schedule (MST, School Based Option)
- Daily Medical Log (MED, District Option)
- Attendance Notes (ATN, District Option)
- Teacher Files (TFL, District Option)
- Student Files (SFL, District Option)
- Fees and Fines (FEE, District Option)
- Free and Reduced (FRE, District Option)



- **Pre-Rollover Audit**

Run the Pre-Rollover Audit Listing. Review, verify, and make any corrections required.

[Pre-Rollover Audit Listing Report](#)

- **Coordinate with District and School Departments**

Coordinate with any district and school departments about finalizing any CALPADS/PEIMS and end-of-year reporting prior to your new year rollover to prevent any unnecessary data entry in more than one database.

- [CALPADS -- Closing Out the School Year](#)
- [CA EOY Withdrawals](#)
- [Texas State Reporting](#)

- **Finalize Grading**

Finalize ALL grading by copying grades to grade history and to transcripts for all applicable schools. If a school is using standards-based grades, be sure to copy SBG to SBG history. Also, if the district is using report card history, be sure to run the process for every school using the feature.

- [Standards Based Report Card History](#)
- [Report Card History](#)

- **Rollover Options Summary**

For a summary of all the rollover options available, see the following:

[New Year Rollover Settings](#)