

End of School and Summer Processes

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As of July 12, 2021, this "Learn Veracross" site has been deprecated. It will remain live at least through October 1, 2021, but will no longer be updated. All knowledge content has moved to the new [Veracross Community](#). Please update your bookmarks.

[Here is the new version of this article in the Veracross Community.](#)

Overview

A number of processes are involved in closing the school year and preparing for the next one during the summer. The purpose of this article is to lay out steps to take at the end of the school year and over the summer.

General Resources

There are several resources to consult as you plan the end of the school year and summer in Veracross:

- The "End of School / Summer Processes Worksheet" and additional links are available on the **System Tasks by Month** homepage in Axiom. Please pay special attention to the required items and the amount of lead time to provide to Veracross (for applicable items).
- [Managing the School Year \(Admin and Academic Tasks\)](#)

End of School and Summer Workflows

There are a number of things to consider when closing the school year and managing summer tasks. Here follows a summary of those tasks with links to documentation:

Closing and Starting the School Year

Closing the school year involves checking and updating data before running a "Verify Close School Year" procedure and submitting a client portal request to have Veracross close the year. Starting the school year can be done at any time after by the school.

- [Closing the School Year](#): Notify your account manager at least seven days prior to your desired close date.
- [Starting the School Year](#): This is often done two weeks prior to the start of school, though can be

accomplished at any time by the school.

Account Management and Portal Membership

With students departing the school and new ones entering, accounts are removed and added, affecting security roles and portal membership.

User Accounts

- [User Accounts Management Overview](#): Create new accounts, update security roles, convert parent to faculty/staff accounts, remove user accounts, etc.
- [Creating Future Student and Parent Accounts](#): Some schools create accounts for future students and parents.

Launching Portals (First Year with Veracross)

- [Launching Parent/Student Portals for the First Time](#): Certain workflows are recommended if you are launching these for the first time to your parents and students.
- [Launching the Teacher Portal for the First Time](#): Certain workflows are recommended if you are launching these for the first time to your teachers.

Managing and Relaunching Portals (After the First Year)

- [Launching/Managing Existing Parent/Student/Teacher Portals](#): Create new accounts and manage membership in existing portals over the summer.
- [Managing Portal Membership](#): Veracross does not automatically remove portal accounts. Learn how portal membership is added and how it can be removed in several different ways.
- [Rolling the Portal Year Forward](#): The “year” reflected in a portal is managed manually. Learn how portal components and system screens are affected.

Visibility of Portal Classes and Documents

Separately from who can access portals (covered above) is the question of showing and hiding certain information over the summer while it is all being configured.

- [Hiding Information in Portals](#): Hide certain information in portals as needed while schedules and classes are being worked on over the summer.

Classes and Scheduling

- [Class Schedules and Rosters for the Upcoming School Year](#): There are six different options available for scheduling in Veracross: using the Veracross Scheduler, Homeroom Scheduling, using the Veracross Excel Template, importing classes & enrollments using the Veracross Import Tool, using Class A Scheduler by Longhouse, and entering schedules into Veracross manually. **If**

you plan to use either the Veracross Excel template or a third party scheduler (such as Class-A), please provide this data to your Project Manager at least fourteen days (two weeks) in advance.

- [Copy Classes to Next Year](#): Copying classes to next year is often done to start the scheduling process.
- [Importing Classes and Class Enrollments](#): Classes and enrollments can be imported.
- [Copy Assignments and Lesson Plans](#) Teachers can copy assignments and lesson plans from classes they taught last year to classes they are teaching in the coming year.
- [Set up Calendar Day Rotations](#): This process is needed for rotations other than M-F.
- [Schedule Document](#): Read about what drives this document and how to display next year's.

Calendars and Transportation Schedules

- [Copy or Import Events to Next School Year](#): There are several ways to create events for the next school year, and many schools take advantage of the ability to copy and/or import events.
- [Copy Transportation Schedules](#): Schools that manage transportation with Veracross can copy transportation schedules to next year.

Directories

- [Rolling Directories Over to the New School Year](#): Directories reflect information in the current school year, so though there is no separate procedure to “roll” them to the next school year, it is important to keep them in mind when closing the school year.

Photo Management

- [Photo Manager](#): The photo manager allows schools to manage student and faculty photos on their own. Anyone with a primary staff role can upload photos, rename photos in batch, assign photos to people, replace assigned photos, or delete photos.
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