End of Year Checklist for Administrators

As you wrap up your year, there are a few steps to ensure your account is in order. Please follow the steps outlined below to 1) prepare to close your year, 2) close the current year, and 3) to set up the new school year. If you run into any difficulties or have questions, reach out to our team at help@kaymbu.com.

Before Closing Your Year

- ❏ **Communicate with your team**
    - ❏ Determine which administrator will be closing the year
    - ❏ Communicate timeline with team so that all users know when the year will be closed and the system will be unavailable

- ❏ **Finalize program data**
    - ❏ Confirm rosters accurately reflect the end of the current year
        - ❏ *Note: All children who should be captured in the end of year snapshot should be active in their current classroom. Please do not move any student profiles for summer programming or next year until after the year closing!*
    - ❏ Confirm all observations are published
    - ❏ Confirm period dates are accurate and final

- ❏ **Export key reports**
    - ❏ While you will be able to pull reports after the year is closed, we recommend pulling key ones before so that you can access them while the account is unavailable for year closing.

Closing the Current Year

- ❏ Navigate to *Settings* > select *Period Settings* > select the red *Close School Year* button
- ❏ You will be guided through a series of options related to your content, users, and students. You can learn more about all of these options with our Closing Your School Year article, available on help.kaymbu.com.
- ❏ Once you finish closing your school year, the account will be unavailable for a few hours.

Setting Up Your New Year

- ❏ **Update the current school year name**: Navigate to *Settings* > select *Period Settings* > under School Year, select the pencil icon to rename the current school year

- ❏ **Add assessment periods**: Navigate to *Settings* > *Period Settings* > click the green plus button next to Add New Periods

- ❏ **Classroom rosters**
    - ❏ <u>Rename</u> classrooms by navigating to *Settings* > selecting the classroom > selecting the pencil icon
        - ❏ Note: If you need to remove or delete classrooms, please reach out to our team at <u>help@kaymbu.com</u>.

    - ❏ <u>Move</u> children to their new classrooms by locating their profiles in the *Roster* > select the box next to the child(ren)'s name and click the three dots from the black bar that appears on the top of the screen. Select *Move* and their destination or *Archive* to deactivate the profile.

    - ❏ <u>Add</u> new students by navigating into the classroom > selecting the green plus button in the lower right-hand corner and adding the required information.
        - ❏ Note: If you have over 50 new students to add, please reach out to <u>help@kaymbu.com</u> and our team is happy to process a bulk upload for you!

- ❏ **Move and remove users**
    - ❏ <u>Delete</u> or <u>move</u> teachers by navigating to the *Roster* > selecting the teacher's classroom > selecting the *Teachers* tab > and opening the teacher's profile. Here, you can click the red *Delete* button to remove the user or click the green *Move* button to move the user to a new room.
        - ❏ Note: You can also move or delete administrators as needed by locating their profiles in the Roster