

End of Year Checklist for Administrators

As you wrap up your year, please review the following checklists to ensure your account is in order and ready to move forward to the next year. **The following workflow must be followed to transition into the new school year, as simply changing or updating your period dates without closing the year will completely replace and overwrite your previous year's assessment data.**

The following steps outlined below will walk you through:

- Prepping to close your current school year
- Closing the current school year
- Setting up your new school year
- Managing last school year's content

If you have questions on this process, please reach out to our team at help@kaymbu.com.

Preparing to Close Your Current School Year

- ☐ **Communicate with your team!**
- ☐ Determine which administrator will be closing the year. ***Please note: only the highest-level user can close the school year.***
- ☐ Communicate the timeline to your team so that all users know when the year will be closed, and the system will be unavailable.
- ☐ Finalize program data.

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❑ Confirm rosters accurately reflect the end of the current year. Note that all children's data that should be captured at the end of the year should be active in their current classroom.

Please do not make any changes to your roster (including adding, moving, or archiving students) until after the year has been closed.

❑ Confirm all observations are published.

❑ Confirm period dates are accurate and final. ***Please note: the platform will instinctively establish the upcoming year's start following the end date of your latest evaluation window.*** For example, if the final period wraps up on May 31st, the subsequent school year will be set up to start on June 1st, regardless of when the actual closing is finalized.

❑ Lock all periods by clicking on the lock icon under each period (see below).

Account Name	Period 1	Period 2	Period 3
Learning Academy			 

❑ Export key reports. While you will be able to pull reports after the year closes, we recommend pulling key data before starting the closing process so you can access them while the account is unavailable during the year-closing process.

Closing the Current School Year

❑ Once all periods have been locked, click on the three dots located next to the current school year and select "Close School Year". ***Please note: you will not be able to close your year without locking all periods first.***

Account Name	Period 1	Period 2	Period 3
Learning Academy			

School Year		
Name	Status	
2023-2024	Current	
2022-2023	Closed	09/08/2023

School Year		
Name	Status	
2023-2024	Current	
2022-2023	Closed	Rename School Year Close School Year

- ☐ You will be prompted to acknowledge that the year-closing process is **permanent and irreversible** and that you are the authorized staff member initiating the year-closing process for your account. Once confirmed, select “Next”.

Close School Year (1/3)

Closing the school year allows you to preserve a record of your assessment data from this year and start a new year with its appropriate periods.

☒ I understand the year-closing process is permanent and irreversible and will affect all organizations, centers, and classrooms in my account.

☒ I am authorized by my organization to initiate and complete the year-closing process.

CANCEL

NEXT

You will then need to confirm that you are locking your assessment data for your entire account. In doing so, you acknowledge that your Assessment Dashboard will be reset for the new school year, your data from the previous year will be preserved, and that data can no longer be edited. **Again, once this action is completed, it cannot be reversed.**

❑ To confirm, you must type “**LOCK ASSESSMENT DATA**” exactly as it appears in the prompt. Then, select “**Next**”.



The screenshot shows a modal window titled "Close School Year (2/3)" with a close button (X) in the top right corner. The background is a blurred image of a dashboard with various icons and data. The main text inside the modal reads: "Once you perform this action, you will lock assessment data for 51 students and:". Below this, there are four bullet points: a green checkmark for "Your assessment dashboard will be reset for the new year", a green checkmark for "Your data from this year will be preserved", a red X for "You will no longer be able to edit data from this year", and a red X for "This process is IRREVERSIBLE". Below the list, it says "Type **LOCK ASSESSMENT DATA** below to proceed to lock your school year". There is a text input field with the placeholder "Sentence" and the text "LOCK ASSESSMENT DATA" entered. At the bottom, there are two buttons: "PREVIOUS" and "NEXT".

❑ Lastly, as the authorized staff member closing the school year for your account, you will need to enter your name to complete the data-locking process. This is to confirm that you are authorizing the closing of your school year. Once your name has been entered, select “**Close School Year and Permanently Lock Data**”.

Signature Authentication (3/3)

Type your full name below, then click the button to complete the data-locking process.

Your Name
Virginia Rollins



[PREVIOUS](#) [CLOSE SCHOOL YEAR AND PERMANENTLY LOCK DATA](#)

Depending on the size of your account, it may take up to 24 hours for the school year closing process to complete. During this time, all users will be unable to access their accounts until the system closes the year.



Year closing is in progress!

We are configuring the account for the new school year. This may take up to a few minutes. You can keep this window open or check back again shortly!

Almost there!



Setting Up Your New School Year

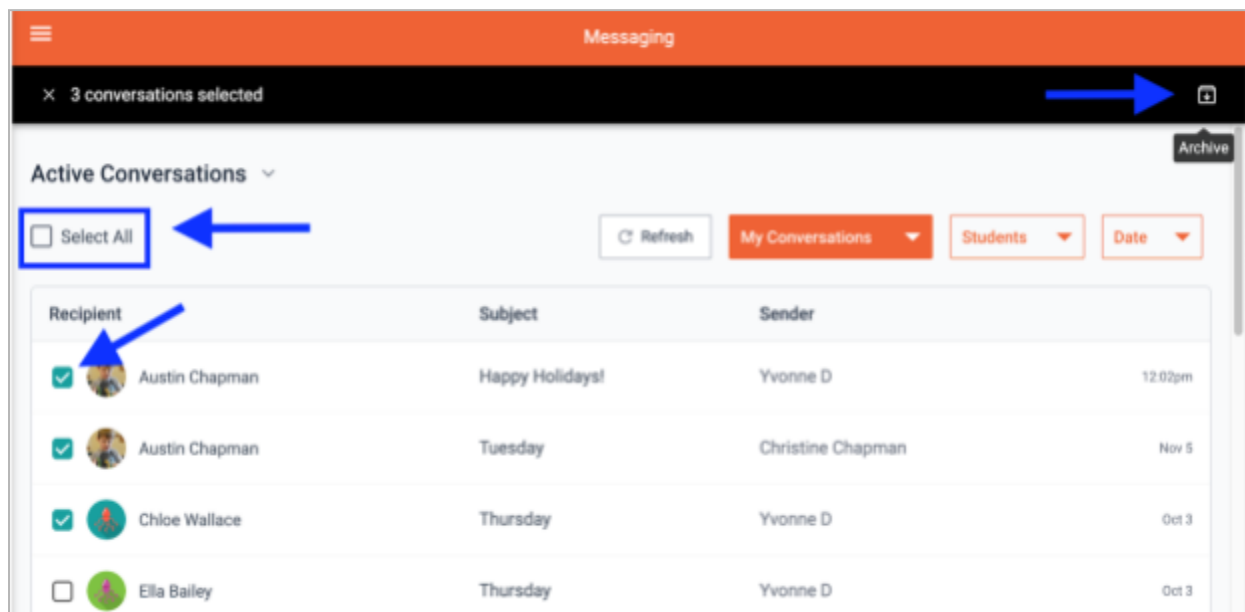
- ❑ **Update the current school year name:** Navigate to *Settings* > select *Period Settings* > under School Year, select the pencil icon to rename the current school year.
- ❑ **Add assessment periods:** Navigate to *Settings* > *Period Settings* > click the green plus button next to “Add New Periods”.
- ❑ **Classroom rosters:**
 - ❑ **Rename** classrooms by navigating to *Settings* > selecting the classroom > selecting the pencil icon. ***Please note: If you need any support deleting or removing classrooms, please reach out to our team at help@kaymbu.com.***
 - ❑ **Move** 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.
 - ❑ **Add** new students by navigating into the classroom > selecting the green plus button in the lower right-hand corner and adding the required information.
Please note: if you have over 50 new students to add, please reach out to help@kaymbu.com, and our team will be happy to process a bulk upload for you!
 - ❑ **Move and remove users:** Delete or move 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. ***Please note: you can also move or delete administrators as needed by locating their profiles in the Roster.***

Managing Last School Year's Content

Clear your inboxes by archiving or filtering away outdated messages and announcements using the following steps.

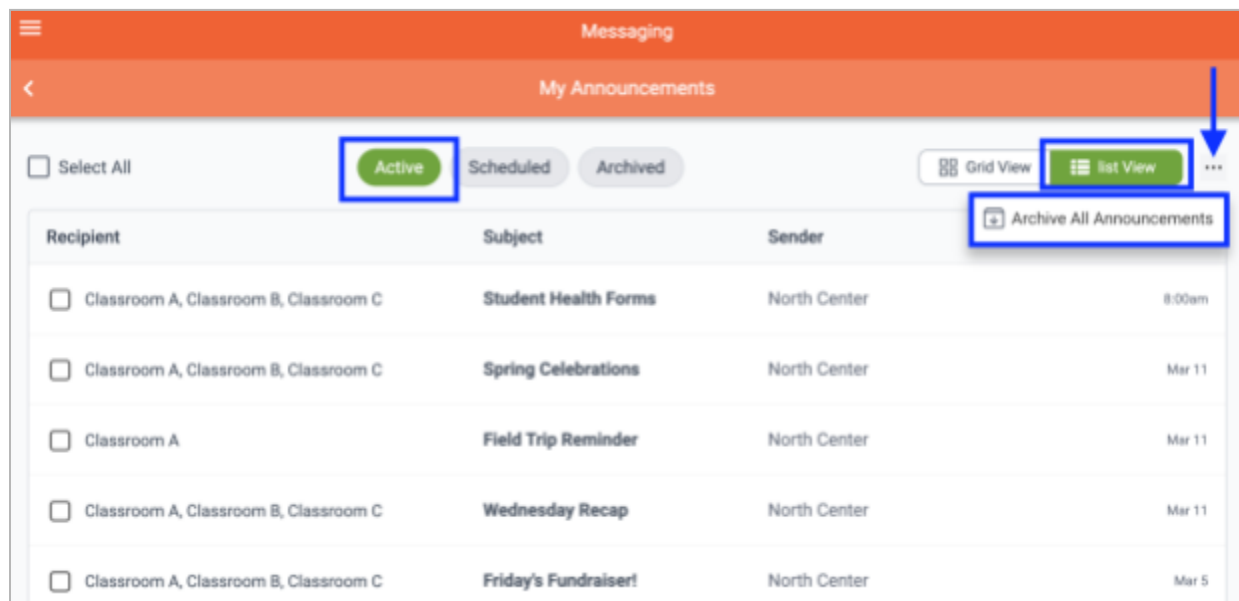
❑ **Archiving Conversations:** Archiving Conversations enables you to remove outdated messages from your active inbox, filtering them out of view. ***Please note: archiving a Conversation does not delete the message; instead, it will move the message to your archive inbox.*** To archive a Conversation, follow the steps below:

- ❑ Navigate to Menu > Messaging.
- ❑ Select the Conversations tab at the top of the page.
- ❑ Select All or select multiple conversations to archive messages simultaneously.
- ❑ Once the messages have been selected, click the archive icon at the top of the page.



❑ **Archiving Announcements:** Archiving Announcements will remove the message from your active inbox and from the inboxes of all recipients. ***Please note: archiving an announcement does not delete it; instead, it will move the message to your archive inbox.*** To bulk-archive all of your Active Announcements, follow the steps below:

- ❑ Navigate to Menu > Messaging.
- ❑ Click on the Announcements tab at the top of the page.
- ❑ Select “See All” located on the right-hand side of the page.
- ❑ From the Active tab, select List View.
- ❑ Click on the three dots at the top of the page.
- ❑ Select Archive All Announcements.





❑ **Set up your Content Visibility Settings:** Filter out previous Moments and Storyboard content from the year before by navigating to Menu > Settings > Moments and Storyboards Settings > Content Visibility Settings. The Content Visibility Settings can be customized and locked at different account levels depending on your account setup and access level.

Content Visibility Settings

Allow Classrooms to set a different default start date

Filter Moment Content

Display Moments created on or after

9/2/2024

Filter Storyboard Content

Display Storyboards created on or after

9/2/2024