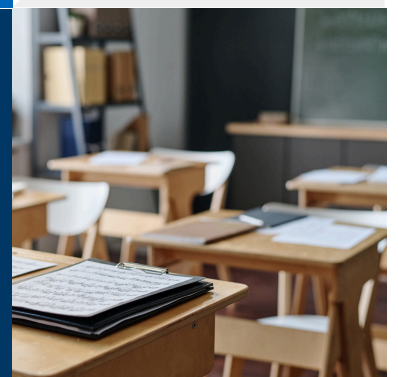


Annual Student Information System (SIS) Rollover Checklist

A practical guide for K–12 districts preparing for a new school year

[Read more >>](#)





About Us

For more than 30 years, Mindex has delivered on the needs of a variety of customers when it comes to software development—and that's a long time.

With the brightest minds, unparalleled dedication, a passion for creating solutions, and thoughtful execution, we collaborate with our customers to achieve their goals through proven technologies, software, and services.

- 01 At-a-Glance Timeline
- 02 End-of-Year Closeout (June)
- 03 New Year Initialization (July)
- 04 Prep for Start of School Year (August)
- 05 Start-of-Year Stabilization (September)
- 06 Grading Cycle Checkpoints (Throughout Year)
- 07 Planning for NEXT Year (December-January)
- 08 Scheduling Building & Forecasting (Spring)
- 09 Best Practices, Common Pitfalls, & Choosing the Right SIS





At-a-Glance **Timeline**

1 At-a-Glance Timeline

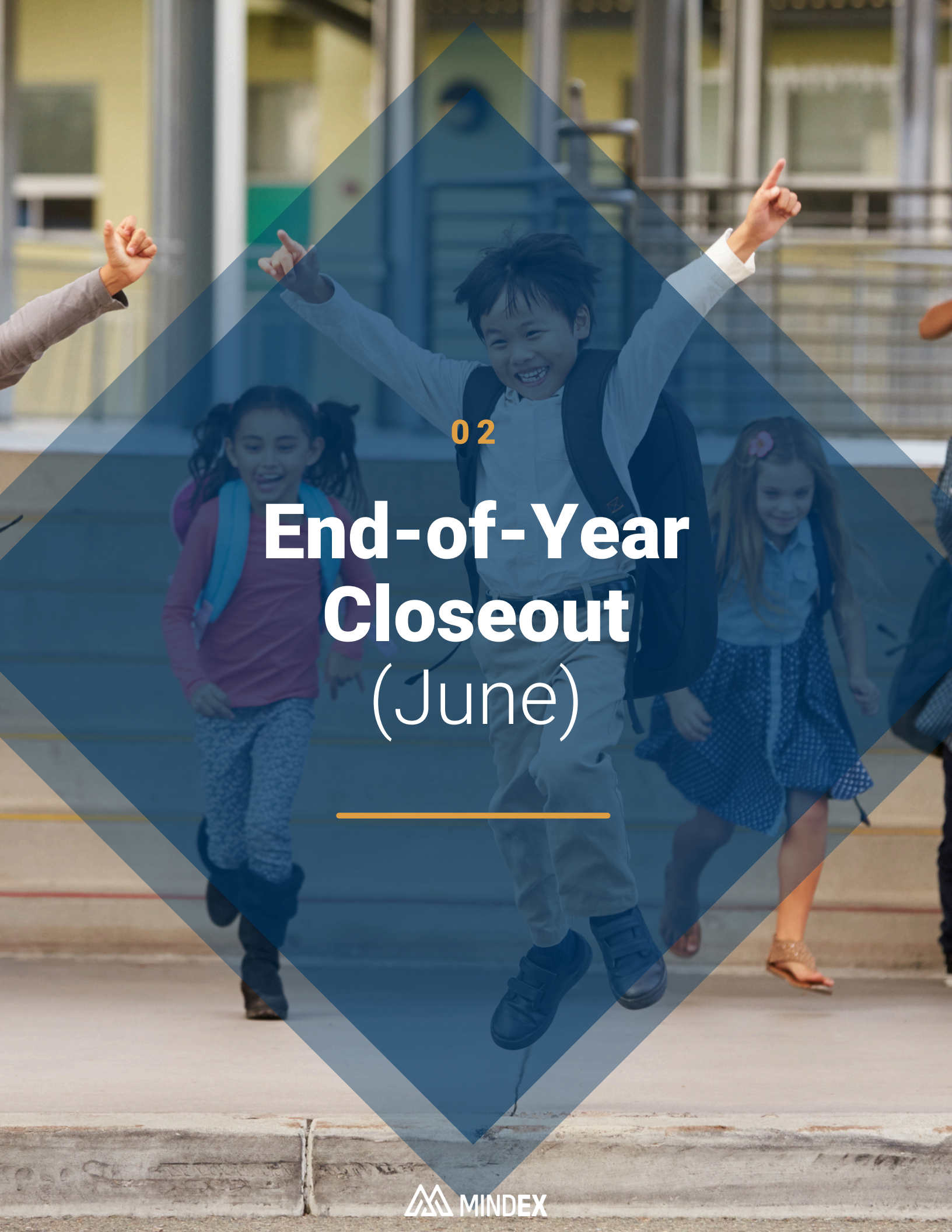
ABOUT THIS GUIDE

Successfully rolling over to a new school year is one of the most critical processes for any district. This checklist provides a **comprehensive, timeline-based framework** to help ensure your SIS data, scheduling, reporting, and compliance requirements, including state reporting obligations, are ready *before students and staff walk through the doors*.

Note: Every SIS and district process differs. Use this as a guideline and adapt based on your system, workflows, and state requirements. Consult your RIC or BOCES for guidance on any additional steps that may be needed as part of your rollover process.

AT-A-GLANCE TIMELINE

Timeframe	Key Focus
June	Close out current year, finalize data, complete reporting requirements
July	Rollover + student advancement
August	Staff setup, schedules, grading/attendance configuration
September–October	Stabilization, reporting activities, + grading cycles begin
Winter (Dec–Jan)	Prepare next-year scheduling foundation
Spring (Feb–May)	Build schedules + next-year planning

A photograph of several children running down a set of concrete stairs. The central child is a young boy with dark hair, wearing a light blue long-sleeved shirt, light-colored pants, and a dark backpack. He is jumping with his arms raised in a 'V' shape, pointing upwards with his index fingers, and has a wide, joyful smile. To his left, a girl with dark hair in pigtails, wearing a pink shirt and patterned pants, is also running. To his right, a girl with long blonde hair, wearing a blue patterned dress, is running. The background shows a school building with windows and a metal railing. A large, semi-transparent blue diamond shape is overlaid on the center of the image, containing the text and a small orange number.

02

End-of-Year Closeout (June)

2 End-of-Year Closeout

(June)



Verify all grades, report cards, and transcripts are complete



Confirm attendance, discipline, and assessment data is finalized



Generate, validate, and archive required reports for state and internal use



Update student outcomes (graduations, withdrawals, promotions)



Reset reusable resources (lockers, devices, etc.)



Assign end dates for staff/administrators leaving the district



03

New Year Initialization (July)

3 New Year Initialization

(July)



Perform system backup before any rollover actions



Create/activate new school year in SIS



Advance students to next grade level (or graduate)



Manually adjust special cases (retentions, transfers, exits)



Convert projected enrollments to active enrollments



Set up program/service year definitions (special programs, billing if applicable)

04

Prep for Start of School Year (August)

4 Prep for Start of School Year (August)

STAFF & ORGANIZATIONAL SETUP



Add new staff and deactivate inactive users



Assign administrators to buildings/roles

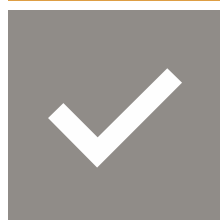


Configure departments, locations, or virtual structures

STUDENT ORGANIZATION



Assign students to homerooms/advisories



Confirm enrollments and building assignments

4 Prep for Start of School Year (August) (cont'd)

SCHEDULING & CALENDAR

	Finalize master schedule
	Lock schedule (or prepare for controlled changes)
	Verify bell schedules / period structures
	Define school calendar (holidays, special days)

4 Prep for Start of School Year (August) (cont'd)

GRADING & REPORTING

	Set grading scales and calculation rule
	Configure gradebook defaults
	Define report card and progress report settings
	Set up honor roll criteria
	Confirm comment banks and report templates

4 Prep for Start of School Year (August) (cont'd)

ATTENDANCE CONFIGURATION



Define attendance tracking method (daily vs. period)



Configure attendance policies and thresholds



Review attendance flags and reporting rules

CURRICULUM & PROGRAMS



Roll over curriculum maps or course content



Update graduation requirements



Ensure standards and competencies are ready



05

Start-of-Year Stabilization (September)

5 Start-of-Year Stabilization (September)



Allow schedule flexibility during first weeks
(add/drop changes)



Monitor data accuracy for attendance and
schedules



Lock grading periods as needed



Verify teachers can enter grades and
attendance



Confirm reports and communication tools
are working



Review reporting data and resolve
discrepancies as needed

06

Grading Cycle Checkpoints (Throughout Year)

6 Grading Cycle Checkpoints (Throughout Year)

BEFORE EACH PROGRESS REPORT OR MARKING PERIOD:



Ensure grading windows are open



Confirm report templates and comment banks are available



Verify teachers have access and training



Spot-check grading and attendance data



07

Planning for NEXT Year (December-February)

7 Planning for NEXT Year (December-February)



Define next year's academic calendar



Set marking periods and semesters



Establish scheduling structures (periods, cycle days)



Begin building course catalog



Copy/adjust teams, departments, or groupings



Set schedule publication expectations

Calendar

DASHBOARD YEAR VIEW WORK WEEK DAY VIEW TASK LIST SETTINGS

Jessica

Monday 3 Tuesday 4 Wednesday 5 Thursday 6 Friday 7

September < >

1 2
3 4 5 6 7 8 9
10 11 12 13 14 15 16
17 18 19 20 21 22 23
24 25 26 27 28 29 30
31

Schedule Building & Forecasting (Spring)

8 Schedule Building & Forecasting (Spring)



Build master schedule for upcoming year



Run student scheduling processes



Adjust constraints and resolve conflicts



Review class sizes and staffing allocations



Finalize courses, teachers, and sections

Best Practices for a Smooth Rollover

-  Always backup critical data before major changes (i.e. master schedules)
-  Complete tasks in the correct order (dependencies matter)
-  Test configurations before opening access to staff
-  Document your district-specific workflow for consistency
-  Train staff ahead of grading periods and schedule changes
-  Consult your RIC or BOCES for additional guidance specific to your rollover process

Common Pitfalls to Avoid

-  Rolling over data before verifying prior year accuracy
-  Skipping backups before major operations
-  Unlocking grading or attendance too late
-  Forgetting to update calendar or reporting settings
-  Overlooking special programs or compliance data

How the Right SIS Can Make This Easier

MANAGING A YEARLY ROLLOVER INVOLVES HUNDREDS OF INTERCONNECTED STEPS, AND THE COMPLEXITY GROWS WITH DISTRICT SIZE, COMPLIANCE REQUIREMENTS, AND CUSTOMIZATION.

A modern SIS should help you:

- Automate repetitive rollover tasks
- Minimize manual data entry and errors
- Provide clear workflows and dependencies
- Simplify scheduling and forecasting
- Ensure compliance reporting is built-in; not bolted on



"Making such a large scale change causes a certain amount of angst, but we got to the point where we saw there were quite a few limitations with the system we were using, and it was worth it to move forward and transition to SchoolTool."

**D. Henderson,
Director of Computer
Services, Victor CSD**

Why Districts Choose **SchoolTool**®

SchoolTool is designed specifically to support complex district workflows like annual rollovers, without the chaos.

**Execute
guided,
structured
yearly
rollovers**



**Manage
scheduling,
grading, and
attendance in
one unified
system**



**Adapt to
district-
specific needs
without heavy
customization**



**Maintain data
accuracy and
compliance
with confidence**

Leading the way as the **most trusted** K-12 Student Management System in New York State.

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